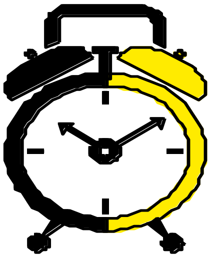
MAINTENANCE

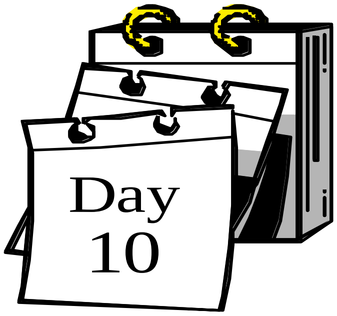
Case Management Screens

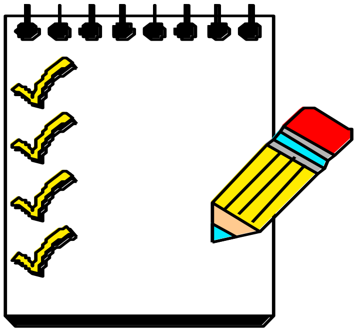
Client History Screens

Attaching & Retrieving Notes

Document Generation Process







MA-02

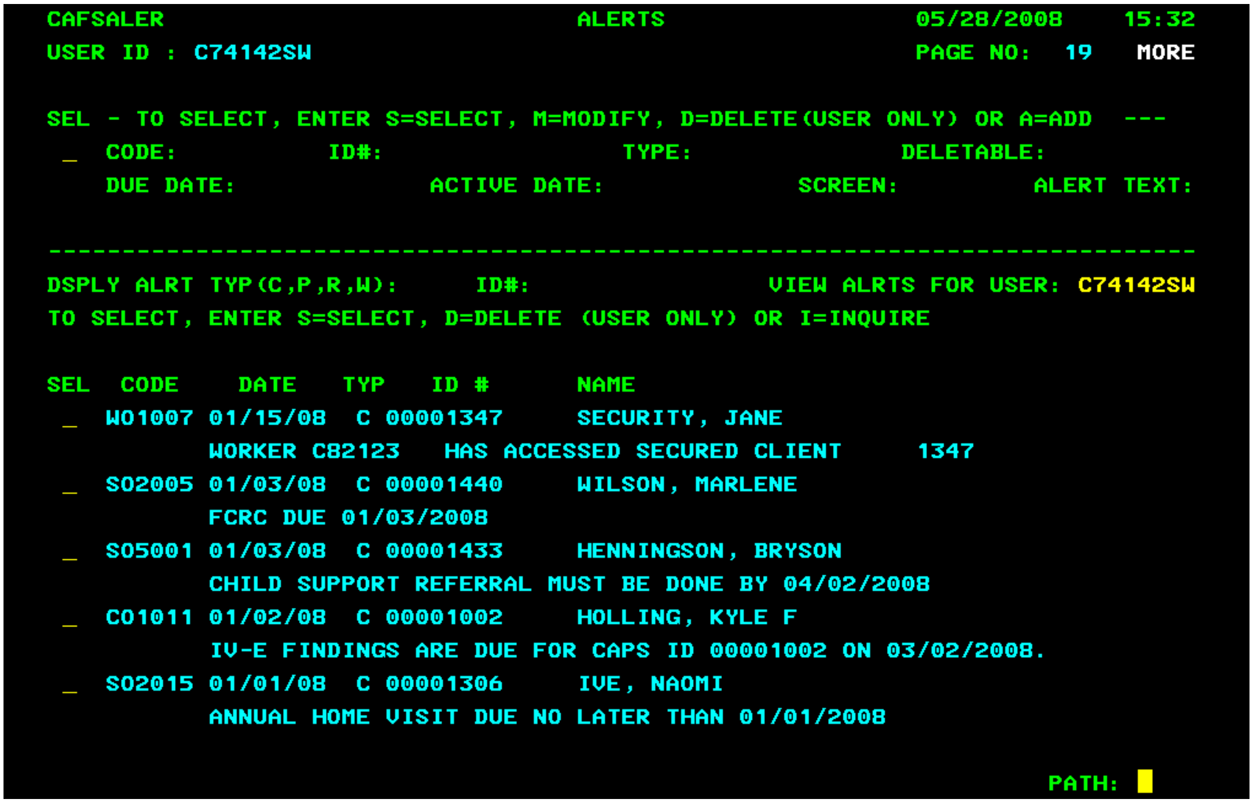
- Caseload List is accessible from any screen in CAPS by pressing the F4 key
    - Only the worker and their supervisor will be able to view the CSLL (Caseload List)

- Selecting a client will take the worker to the CLID (Client Detail) screen
    - The selected client's information will be carried from screen to screen until another CAPS ID is entered in the header

- Selecting a report will take the worker to the RRD1 (Report/Request Intake Detail 1) screen

- Alerts will be a handy tool for managing the needs of a case
    - Check your ALER screen frequently

ALER - Alerts



```
CAFSALER                            ALERTS                 05/28/2008    15:32
USER ID : C74142SW                                         PAGE NO:  19   MORE

SEL - TO SELECT, ENTER S=SELECT, M=MODIFY, D=DELETE(USER ONLY) OR A=ADD  ---
 _  CODE:            ID#:               TYPE:              DELETABLE:
    DUE DATE:               ACTIVE DATE:             SCREEN:         ALERT TEXT:

------------------------------------------------------------------------------
DSPLY ALRT TYP(C,P,R,W):     ID#:               VIEW ALRTS FOR USER: C74142SW
TO SELECT, ENTER S=SELECT, D=DELETE (USER ONLY) OR I=INQUIRE

SEL  CODE    DATE   TYP   ID #      NAME
 _  W01007 01/15/08  C 00001347     SECURITY, JANE
           WORKER C82123  HAS ACCESSED SECURED CLIENT     1347
 _  S02005 01/03/08  C 00001440     WILSON, MARLENE
           FCRC DUE 01/03/2008
 _  S05001 01/03/08  C 00001433     HENNINGSON, BRYSON
           CHILD SUPPORT REFERRAL MUST BE DONE BY 04/02/2008
 _  C01011 01/02/08  C 00001002     HOLLING, KYLE F
           IV-E FINDINGS ARE DUE FOR CAPS ID 00001002 ON 03/02/2008.
 _  S02015 01/01/08  C 00001306     IVE, NAOMI
           ANNUAL HOME VISIT DUE NO LATER THAN 01/01/2008

                                                                    PATH: █
```

- The alert screen displays messages that have been created by the system or by the worker, pertaining to the workers cases
  - To view the entire alert, select it with an “I” to display at the top half of the screen

- Alerts are triggered by events, due dates and errors. Examples of alerts are:
  - Notify the worker of an upcoming review date
  - Notify the worker when a client’s service eligibility changes
  - Notify the worker that certain eligibility information needs to be completed
  - Notify the worker of an upcoming court date
  - Notify the worker that payment approval over 5 days old

- Each alert will be displayed at a pre-set number of days prior to the due date as defined in the Code Table

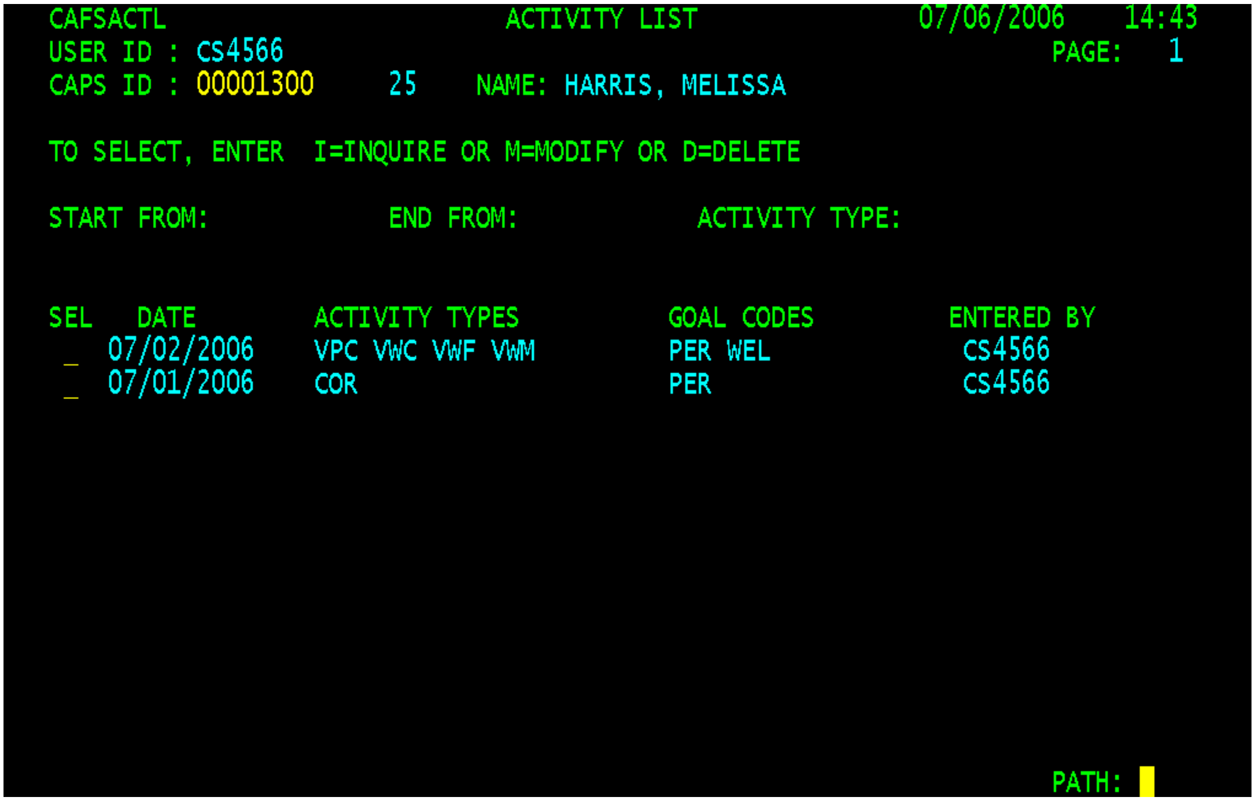
- An alert will remain until a required action is taken, then CAPS or the worker will delete it by typing a “D” on the select line
  - If the alert is not a deletable alert, the worker must select it with an “S”
  - The worker will be taken to the appropriate screen to take action on that alert

- To create an alert, enter an “A” in the select field, at the top of the screen, and all of the information needed pertaining to the type of alert that you are trying to create

- To DELETE an alert, enter a “D” at the appropriate line and press ENTER
  - You may delete alerts that you have created yourself and certain system generated alerts which have been defined as deletable

- To limit the alerts that are viewed, a worker may indicate the alert type (C, P, R, W) or type in the ID of the Client, Provider/Payment, Report or any Worker generated alerts

ACTL – Activity List



```
CAFSACTL                        ACTIVITY LIST                 07/06/2006    14:43
USER ID : CS4566                                                      PAGE:   1
CAPS ID : 00001300      25    NAME: HARRIS, MELISSA

TO SELECT, ENTER  I=INQUIRE OR M=MODIFY OR D=DELETE

START FROM:              END FROM:            ACTIVITY TYPE:


SEL   DATE          ACTIVITY TYPES          GOAL CODES          ENTERED BY
 _   07/02/2006     VPC VWC VWF VWM         PER WEL              CS4566
 _   07/01/2006     COR                     PER                  CS4566










                                                                      PATH:
```

- This screen displays the activities for a specific case or client
  - An activity is a significant contact or communication with a client or about the client that can impact the direction of the case
  - EXAMPLE: parental visits, child interview, worker home visits, phone calls

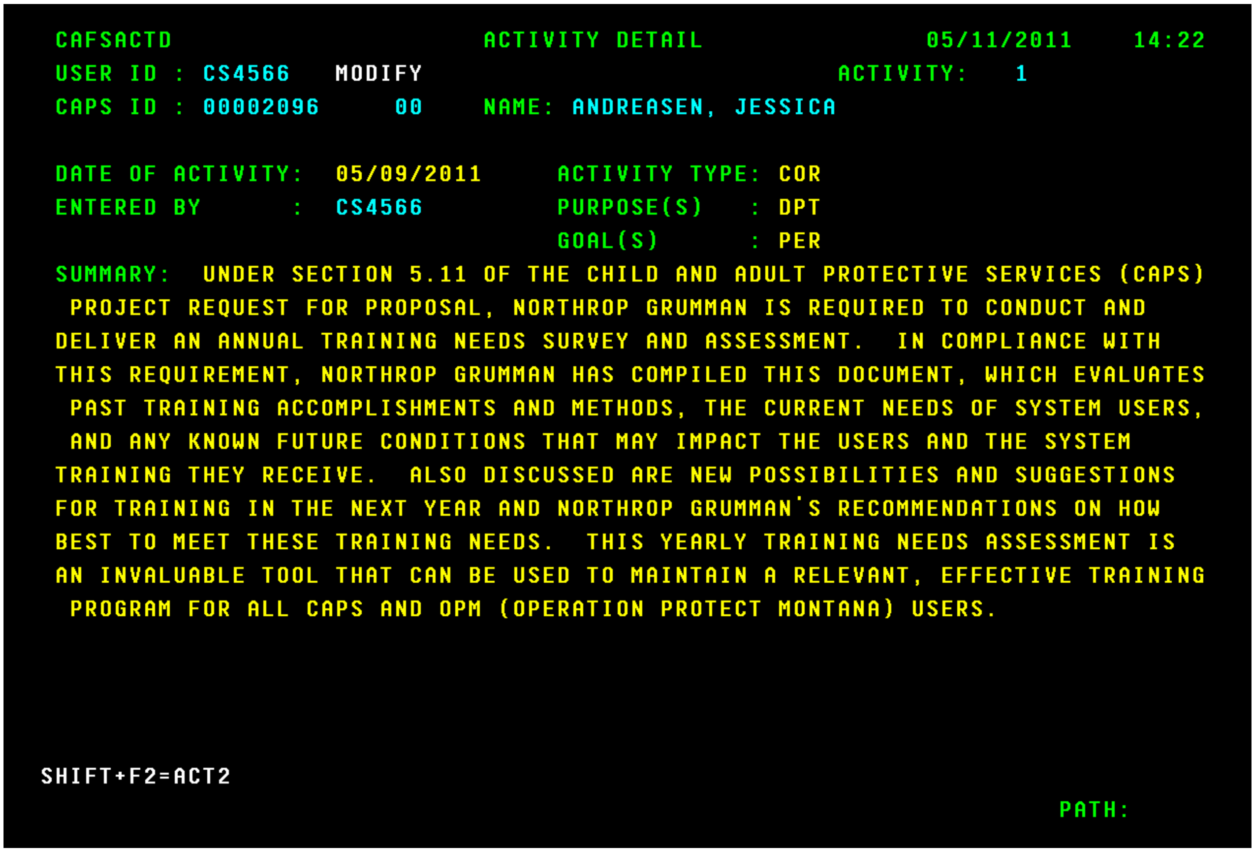
- Worker may select a specific activity to INQUIRE, MODIFY, or initiate the procedure to ADD a new activity by pressing F11

- The START FROM and END FROM fields can be used to view all activities that took place during a specific time period

- Enter an ACTIVITY TYPE(s) to view specific types of activities

- Activity details become protected seven (7) days after they are entered on the Activity Detail (ACTD) screen. If information needs to be modified or removed after seven (7) days, a supervisor must be notified.

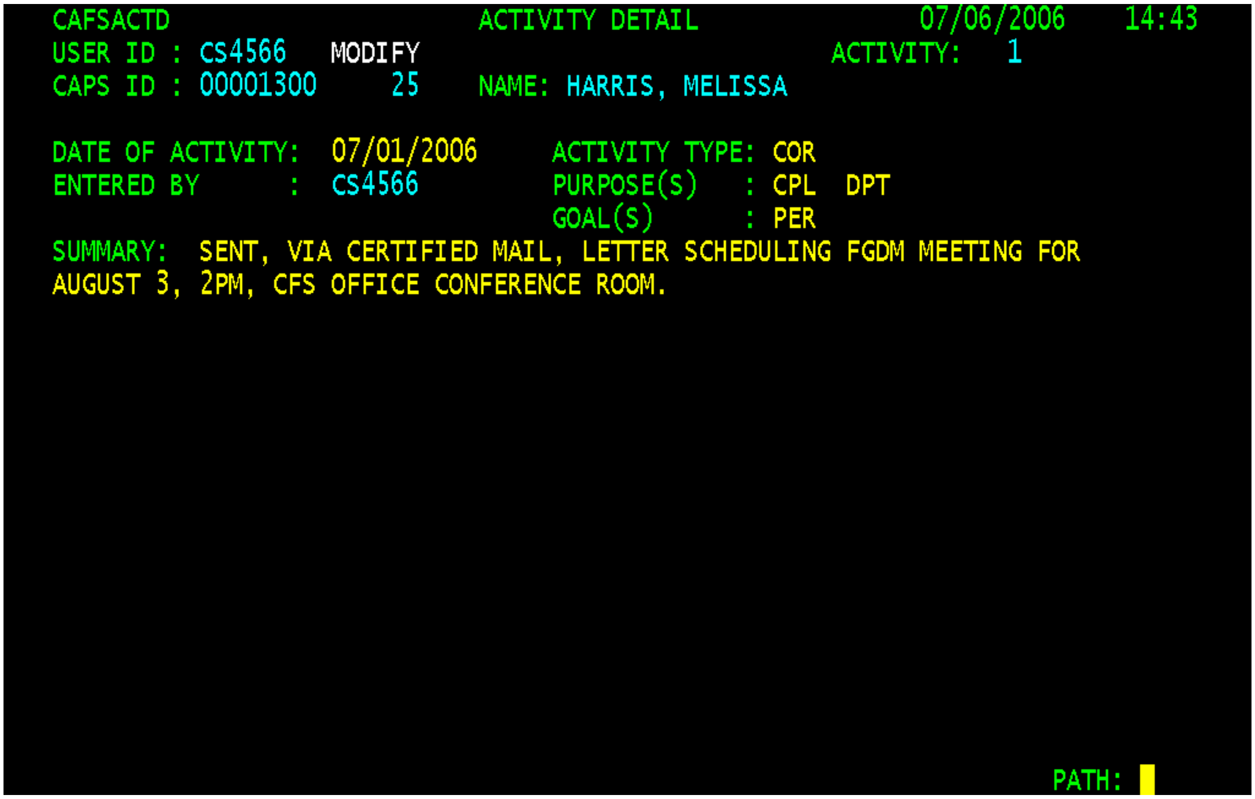
ACTD – Activity Detail



```
 CAFSACTD                     ACTIVITY DETAIL               05/11/2011    14:22
 USER ID : CS4566   MODIFY                             ACTIVITY:   1
 CAPS ID : 00002096     00    NAME: ANDREASEN, JESSICA

 DATE OF ACTIVITY:  05/09/2011     ACTIVITY TYPE: COR
 ENTERED BY      :  CS4566         PURPOSE(S)    : DPT
                                   GOAL(S)       : PER
 SUMMARY:  UNDER SECTION 5.11 OF THE CHILD AND ADULT PROTECTIVE SERVICES (CAPS)
  PROJECT REQUEST FOR PROPOSAL, NORTHROP GRUMMAN IS REQUIRED TO CONDUCT AND
 DELIVER AN ANNUAL TRAINING NEEDS SURVEY AND ASSESSMENT.  IN COMPLIANCE WITH
 THIS REQUIREMENT, NORTHROP GRUMMAN HAS COMPILED THIS DOCUMENT, WHICH EVALUATES
  PAST TRAINING ACCOMPLISHMENTS AND METHODS, THE CURRENT NEEDS OF SYSTEM USERS,
  AND ANY KNOWN FUTURE CONDITIONS THAT MAY IMPACT THE USERS AND THE SYSTEM
 TRAINING THEY RECEIVE.  ALSO DISCUSSED ARE NEW POSSIBILITIES AND SUGGESTIONS
 FOR TRAINING IN THE NEXT YEAR AND NORTHROP GRUMMAN'S RECOMMENDATIONS ON HOW
 BEST TO MEET THESE TRAINING NEEDS.  THIS YEARLY TRAINING NEEDS ASSESSMENT IS
 AN INVALUABLE TOOL THAT CAN BE USED TO MAINTAIN A RELEVANT, EFFECTIVE TRAINING
  PROGRAM FOR ALL CAPS AND OPM (OPERATION PROTECT MONTANA) USERS.




SHIFT+F2=ACT2
                                                                    PATH:
```

- This screen is used to record and display the date of activity and the type, purpose and goal of the activity
- The Entered By field will default to the C# of the worker that is entering the activity and cannot be changed
- Up to five (5) activity codes, four (4) purpose codes and three (3) goal codes can be entered on an individual detail
- Use the summary area to summarize the activity details. If documentation concerning the activity is located elsewhere, note that in the summary
- Press F10 to display the RELL screen and copy activity details to other clients
- Press Shift + F2 to access the Activity Detail 2 (ACT2) screen where additional/continued comments may be entered

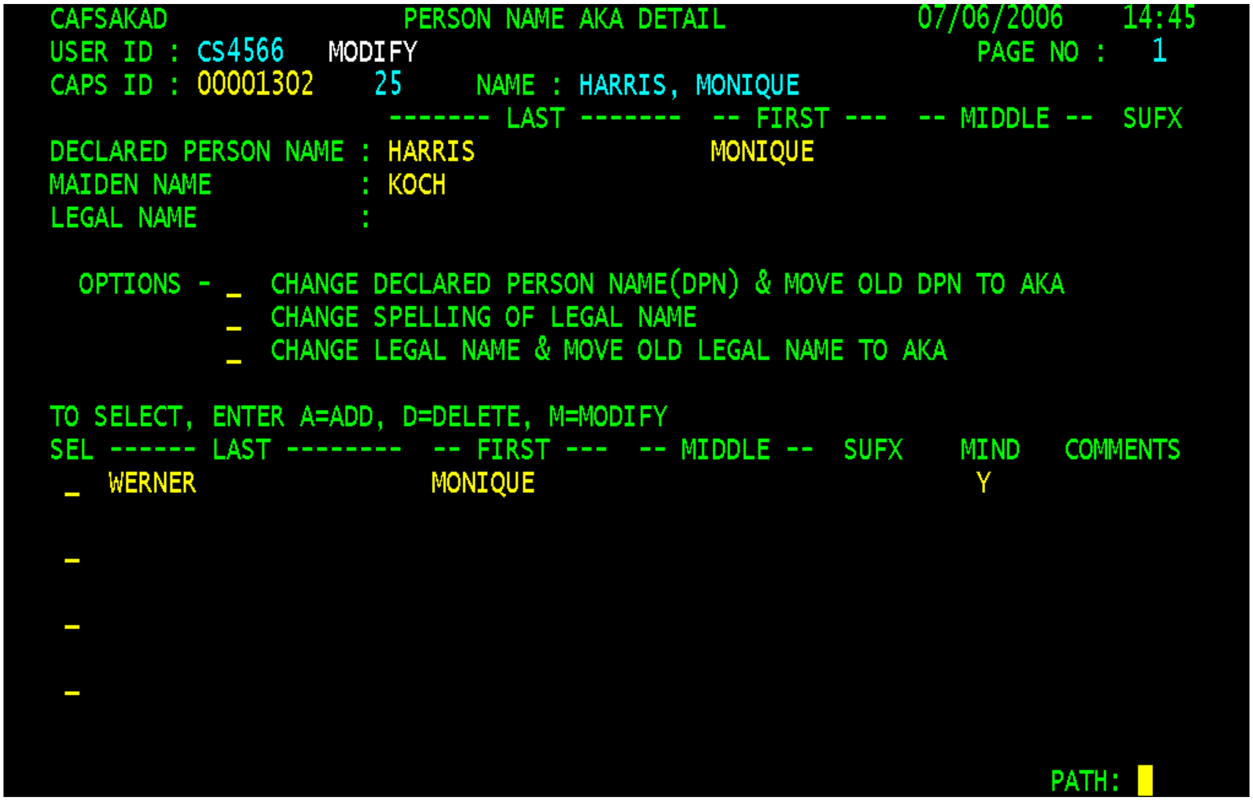
ACT2 – Activity Detail 2



```
CAFSACTD                     ACTIVITY DETAIL              07/06/2006    14:43
USER ID : CS4566   MODIFY                           ACTIVITY:   1
CAPS ID : 00001300     25    NAME: HARRIS, MELISSA

DATE OF ACTIVITY:  07/01/2006     ACTIVITY TYPE: COR
ENTERED BY      :  CS4566         PURPOSE(S)    : CPL  DPT
                                  GOAL(S)       : PER
SUMMARY:  SENT, VIA CERTIFIED MAIL, LETTER SCHEDULING FGDM MEETING FOR
AUGUST 3, 2PM, CFS OFFICE CONFERENCE ROOM.













                                                                   PATH: █
```

- This screen is used to continue comments that were initiated on the Activity Detail (ACTD) screen
- Date of Activity, Activity Type, Purpose(s) and Goal(s) can only be changed on the Activity Detail (ACTD) screen
- Multiple pages of ACT2 can be entered by pressing F11 to add

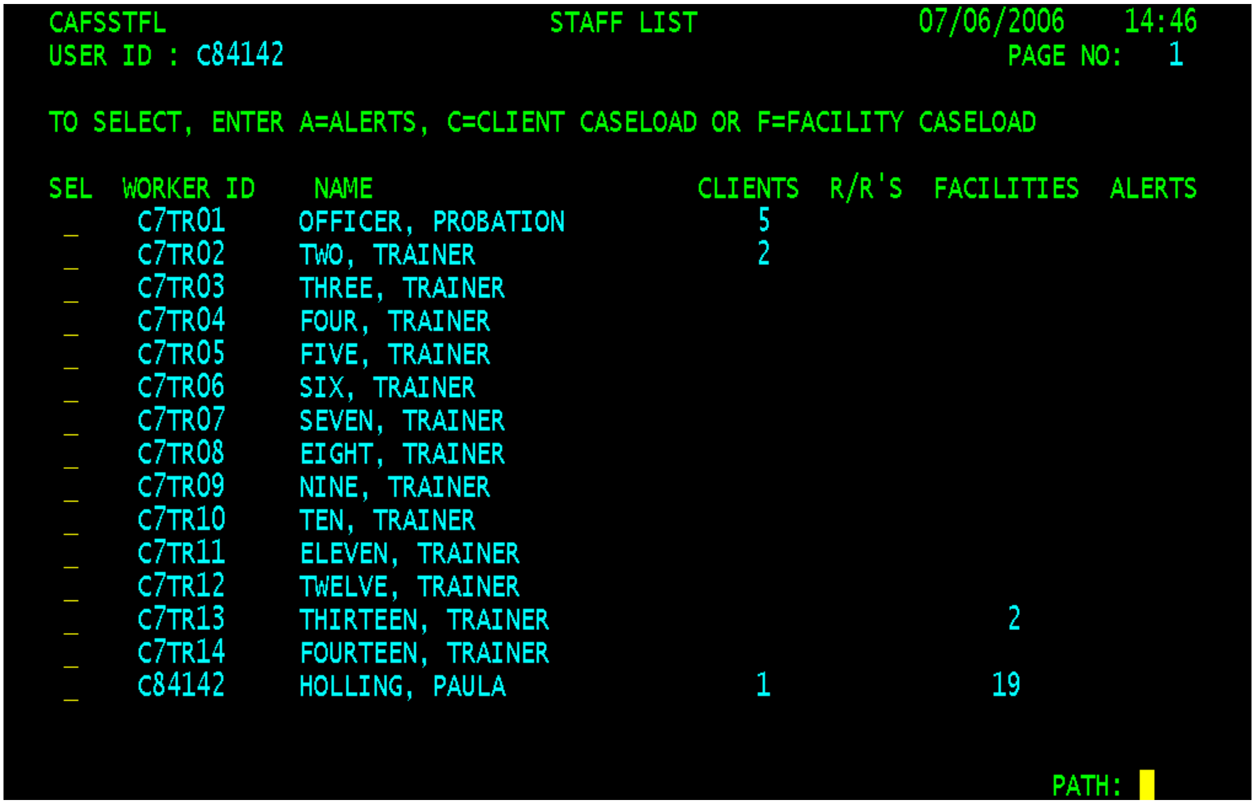
AKAD - Person Name AKA Detail



```
CAFSAKAD                 PERSON NAME AKA DETAIL             07/06/2006    14:45
USER ID : CS4566   MODIFY                                       PAGE NO :   1
CAPS ID : 00001302    25     NAME : HARRIS, MONIQUE
                          ------- LAST -------  -- FIRST ---  -- MIDDLE --  SUFX
DECLARED PERSON NAME : HARRIS                MONIQUE
MAIDEN NAME          : KOCH
LEGAL NAME           :

  OPTIONS - _  CHANGE DECLARED PERSON NAME(DPN) & MOVE OLD DPN TO AKA
            _  CHANGE SPELLING OF LEGAL NAME
            _  CHANGE LEGAL NAME & MOVE OLD LEGAL NAME TO AKA

TO SELECT, ENTER A=ADD, D=DELETE, M=MODIFY
SEL ------ LAST --------  -- FIRST ---  -- MIDDLE --  SUFX    MIND   COMMENTS
 _  WERNER                 MONIQUE                              Y

 _

 _

 _

                                                                       PATH: █
```

- ➢ This screen is used to ADD and MODIFY person name information
- ➢ Each person has a DECLARED PERSON NAME - the first one entered on CAPS
- ➢ Select which action you wish to perform from the OPTIONS list
- ➢ Additional AKA names can be added to the bottom of the screen
- ➢ Only the designated regional “AKA” supertask workers have the authority to DELETE or MODIFY an AKA name at the bottom of the screen
- ➢ Any name that is displayed on AKAD can be located through the PERS (Person Search) process
- ➢ CCUBS NAME will only be displayed for names that were selected by a CAPS licensing worker through the resolution process. They are additional names known to the CCUBS (Child Care Under the Big Sky) system.

STFL - Staff List



```
CAFSSTFL                          STAFF LIST                07/06/2006    14:46
USER ID : C84142                                                  PAGE NO:   1

TO SELECT, ENTER A=ALERTS, C=CLIENT CASELOAD OR F=FACILITY CASELOAD

SEL  WORKER ID    NAME                       CLIENTS  R/R'S  FACILITIES  ALERTS
 _    C7TR01     OFFICER, PROBATION              5
 _    C7TR02     TWO, TRAINER                    2
 _    C7TR03     THREE, TRAINER
 _    C7TR04     FOUR, TRAINER
 _    C7TR05     FIVE, TRAINER
 _    C7TR06     SIX, TRAINER
 _    C7TR07     SEVEN, TRAINER
 _    C7TR08     EIGHT, TRAINER
 _    C7TR09     NINE, TRAINER
 _    C7TR10     TEN, TRAINER
 _    C7TR11     ELEVEN, TRAINER
 _    C7TR12     TWELVE, TRAINER
 _    C7TR13     THIRTEEN, TRAINER                                2
 _    C7TR14     FOURTEEN, TRAINER
 _    C84142     HOLLING, PAULA                  1               19


                                                                     PATH: █
```

- STFL displays all of the workers under the supervision of the supervisor who is logged on and the total number of clients, report/referrals, facilities and alerts in each of their caseloads

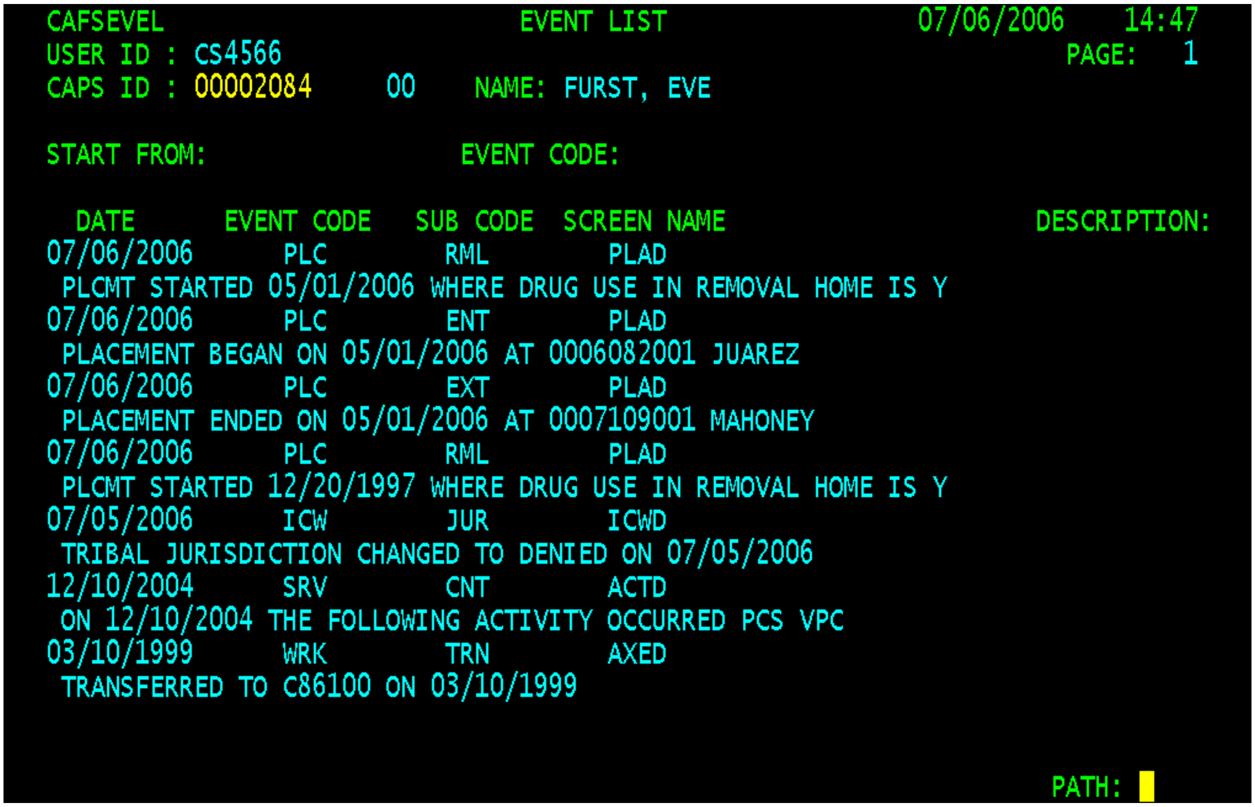
- All data fields are display only

- If a worker line is selected with a “C”, that workers CSLL (Caseload List) screen will be displayed

- If a worker line is selected with an “F”, that workers FCLL (Facility Caseload List) screen will be displayed

- If a worker line is selected with an “A”, that workers ALER (Alerts) screen will be displayed

EVEL - Event List



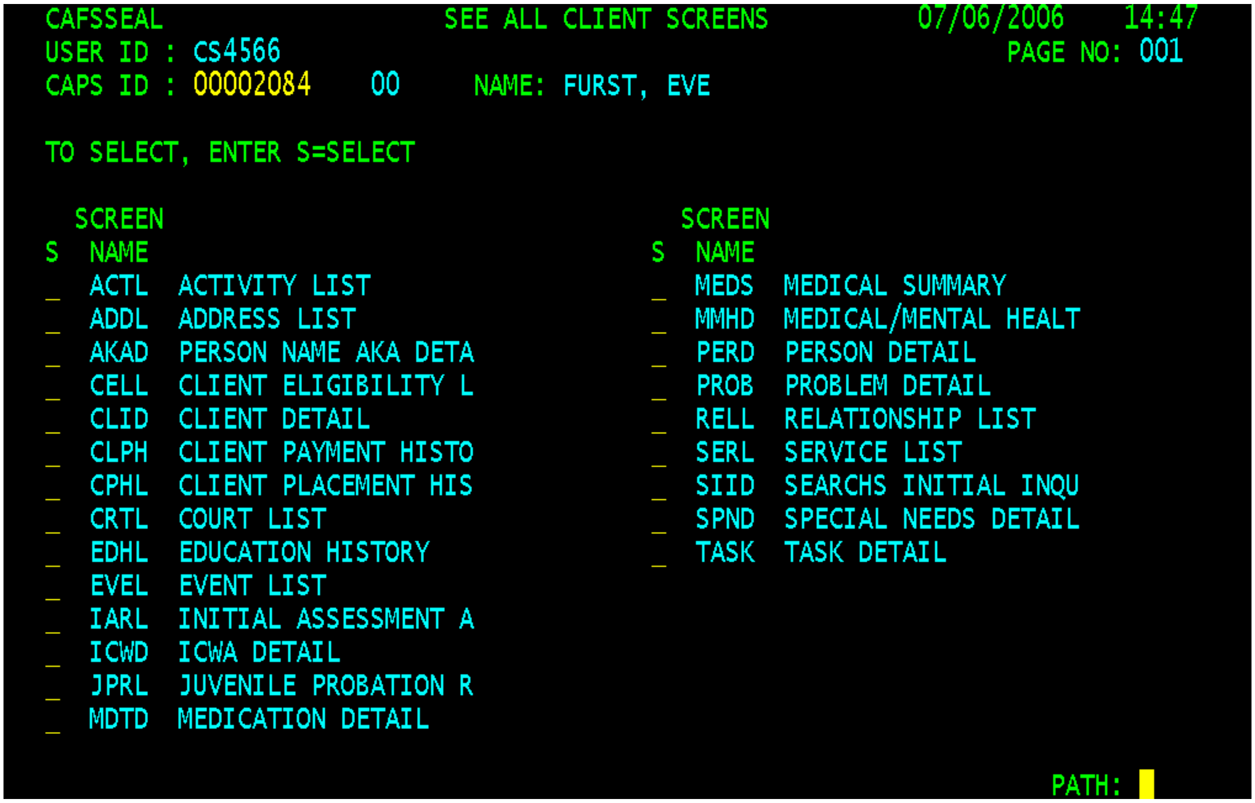
```
CAFSEVEL                        EVENT LIST                    07/06/2006    14:47
USER ID : CS4566                                                        PAGE:   1
CAPS ID : 00002084     00     NAME: FURST, EVE

START FROM:                 EVENT CODE:

  DATE       EVENT CODE   SUB CODE  SCREEN NAME                      DESCRIPTION:
07/06/2006       PLC         RML         PLAD
 PLCMT STARTED 05/01/2006 WHERE DRUG USE IN REMOVAL HOME IS Y
07/06/2006       PLC         ENT         PLAD
 PLACEMENT BEGAN ON 05/01/2006 AT 0006082001 JUAREZ
07/06/2006       PLC         EXT         PLAD
 PLACEMENT ENDED ON 05/01/2006 AT 0007109001 MAHONEY
07/06/2006       PLC         RML         PLAD
 PLCMT STARTED 12/20/1997 WHERE DRUG USE IN REMOVAL HOME IS Y
07/05/2006       ICW         JUR         ICWD
 TRIBAL JURISDICTION CHANGED TO DENIED ON 07/05/2006
12/10/2004       SRV         CNT         ACTD
 ON 12/10/2004 THE FOLLOWING ACTIVITY OCCURRED PCS VPC
03/10/1999       WRK         TRN         AXED
 TRANSFERRED TO C86100 ON 03/10/1999



                                                                     PATH: █
```

- ➢ Display a list of events for a specific client
  - Events are initiated by various functions that occur in CAPS

- ➢ You may view all events or sort by event types, a starting date or both
  - For a specific time period, enter the START FROM date
  - For specific types of applications, enter up to 5 type codes in the EVENT CODE field
  - Enter both a start date and type(s) for a more specific list

- ➢ The screen is for inquiry only

SEAL - See All Client Screens

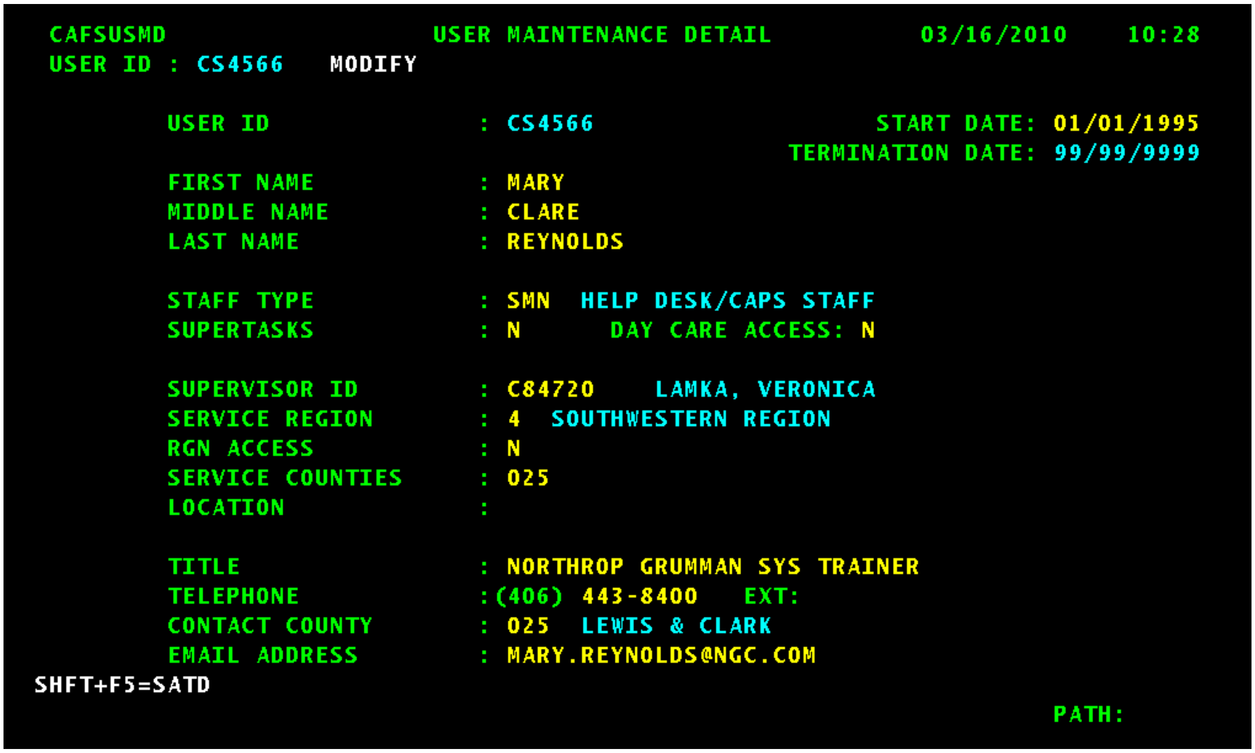


```
CAFSSEAL                    SEE ALL CLIENT SCREENS          07/06/2006    14:47
USER ID : CS4566                                                  PAGE NO: 001
CAPS ID : 00002084    00     NAME: FURST, EVE

TO SELECT, ENTER S=SELECT

  SCREEN                                    SCREEN
S  NAME                                   S  NAME
_  ACTL  ACTIVITY LIST                    _  MEDS  MEDICAL SUMMARY
_  ADDL  ADDRESS LIST                     _  MMHD  MEDICAL/MENTAL HEALT
_  AKAD  PERSON NAME AKA DETA             _  PERD  PERSON DETAIL
_  CELL  CLIENT ELIGIBILITY L             _  PROB  PROBLEM DETAIL
_  CLID  CLIENT DETAIL                    _  RELL  RELATIONSHIP LIST
_  CLPH  CLIENT PAYMENT HISTO             _  SERL  SERVICE LIST
_  CPHL  CLIENT PLACEMENT HIS             _  SIID  SEARCHS INITIAL INQU
_  CRTL  COURT LIST                       _  SPND  SPECIAL NEEDS DETAIL
_  EDHL  EDUCATION HISTORY                _  TASK  TASK DETAIL
_  EVEL  EVENT LIST
_  IARL  INITIAL ASSESSMENT A
_  ICWD  ICWA DETAIL
_  JPRL  JUVENILE PROBATION R
_  MDTD  MEDICATION DETAIL

                                                                   PATH: █
```

- This screen enables a worker to quickly view all the screens that have been filled out and updated on behalf of a client.

- To access a particular screen, place an "S" on the select line - the system will then take you to that screen.

USMD - User Maintenance Detail



```
   CAFSUSMD                  USER MAINTENANCE DETAIL          03/16/2010    10:28
   USER ID : CS4566   MODIFY

           USER ID                 : CS4566                   START DATE: 01/01/1995
                                                        TERMINATION DATE: 99/99/9999
           FIRST NAME              : MARY
           MIDDLE NAME             : CLARE
           LAST NAME               : REYNOLDS

           STAFF TYPE              : SMN  HELP DESK/CAPS STAFF
           SUPERTASKS              : N       DAY CARE ACCESS: N

           SUPERVISOR ID           : C84720    LAMKA, VERONICA
           SERVICE REGION          : 4  SOUTHWESTERN REGION
           RGN ACCESS              : N
           SERVICE COUNTIES        : 025
           LOCATION                :

           TITLE                   : NORTHROP GRUMMAN SYS TRAINER
           TELEPHONE               :(406) 443-8400   EXT:
           CONTACT COUNTY          : 025  LEWIS & CLARK
           EMAIL ADDRESS           : MARY.REYNOLDS@NGC.COM
  SHFT+F5=SATD
                                                                       PATH:
```

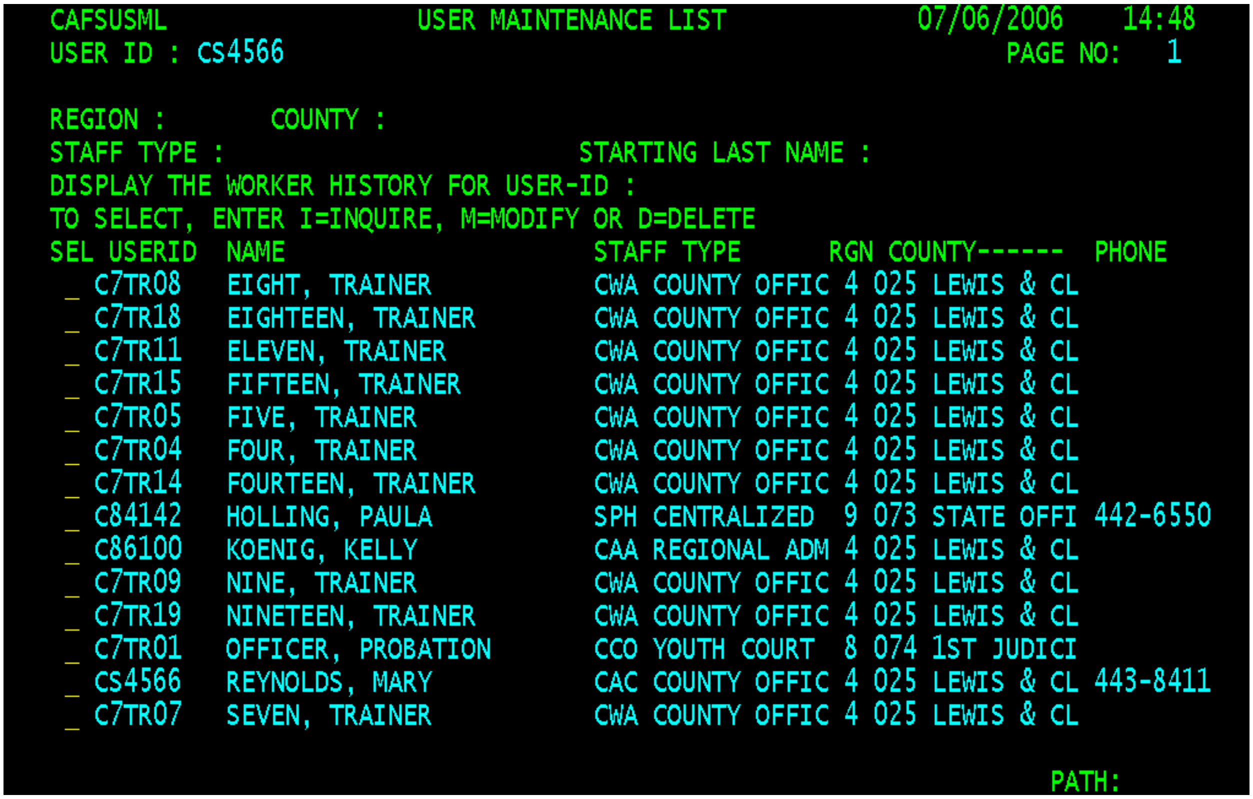
- This screen can be accessed in order to view identifying worker information if all you have is that worker's USER ID

- With the cursor in the USER ID field, type in the C# of the worker. The following information will be displayed
  - Worker's name and staff type
  - Supervisor and Approval Task Indicator ("Y" or "N")
  - Worker's supervisor and service region/counties
  - Worker's Title
  - Worker's phone number and contact county
  - Worker's email address

- This screen is also used to identify start and termination dates for worker's on the system

- If there is a "Y" in the SUPERVISOR AND APPROVAL TASKS field, press SHIFT+F5
  - SATD (Supervisor/Approval Tasks Detail) screen will be displayed
  - You can view what approval tasks or "supertasks" this worker has in the system

USML - User Maintenance List



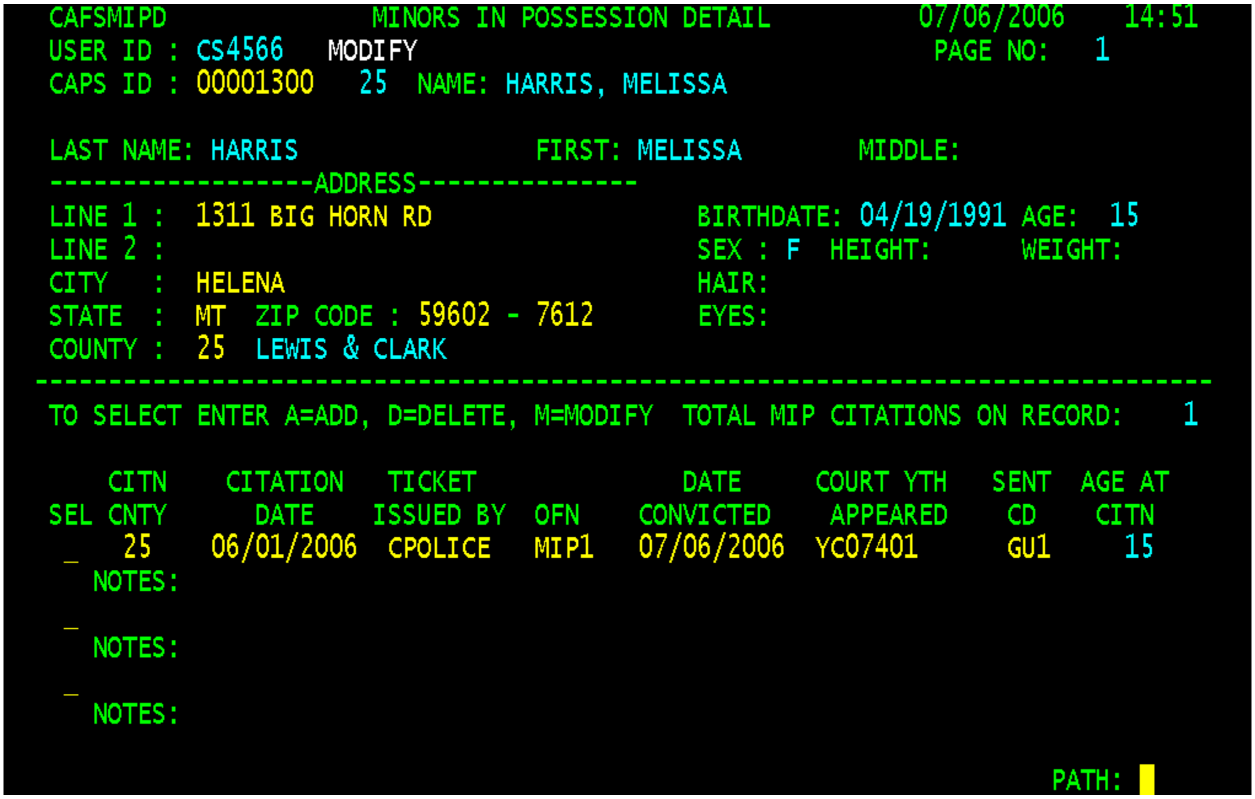
```
CAFSUSML                  USER MAINTENANCE LIST               07/06/2006    14:48
USER ID : CS4566                                                    PAGE NO:   1

REGION :       COUNTY :
STAFF TYPE :                           STARTING LAST NAME :
DISPLAY THE WORKER HISTORY FOR USER-ID :
TO SELECT, ENTER I=INQUIRE, M=MODIFY OR D=DELETE
SEL USERID  NAME                        STAFF TYPE      RGN COUNTY------  PHONE
 _ C7TR08   EIGHT, TRAINER              CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR18   EIGHTEEN, TRAINER           CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR11   ELEVEN, TRAINER             CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR15   FIFTEEN, TRAINER            CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR05   FIVE, TRAINER               CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR04   FOUR, TRAINER               CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR14   FOURTEEN, TRAINER           CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C84142   HOLLING, PAULA              SPH CENTRALIZED  9 073 STATE OFFI 442-6550
 _ C86100   KOENIG, KELLY               CAA REGIONAL ADM 4 025 LEWIS & CL
 _ C7TR09   NINE, TRAINER               CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR19   NINETEEN, TRAINER           CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR01   OFFICER, PROBATION          CCO YOUTH COURT  8 074 1ST JUDICI
 _ CS4566   REYNOLDS, MARY              CAC COUNTY OFFIC 4 025 LEWIS & CL 443-8411
 _ C7TR07   SEVEN, TRAINER              CWA COUNTY OFFIC 4 025 LEWIS & CL

                                                                     PATH:
```

- This screen can be accessed in order to view identifying worker information

- You can search for a worker by
  - Region
  - County
  - Staff type
  - Worker's last name
  - Worker's USER ID

- You have the ability to INQUIRE only on this information. Placing an "I" on the SELECT line next to the worker's USER ID will take you to USMD (User Maintenance Detail) and will display additional worker information

MIPD – Minors in Possession Detail



```
CAFSMIPD              MINORS IN POSSESSION DETAIL          07/06/2006    14:51
USER ID : CS4566   MODIFY                                   PAGE NO:    1
CAPS ID : 00001300   25  NAME: HARRIS, MELISSA

LAST NAME: HARRIS                 FIRST: MELISSA        MIDDLE:
------------------ADDRESS---------------
LINE 1 :  1311 BIG HORN RD                    BIRTHDATE: 04/19/1991 AGE:  15
LINE 2 :                                      SEX : F  HEIGHT:      WEIGHT:
CITY   :  HELENA                              HAIR:
STATE  :  MT  ZIP CODE : 59602 - 7612         EYES:
COUNTY :  25  LEWIS & CLARK
--------------------------------------------------------------------------------
TO SELECT ENTER A=ADD, D=DELETE, M=MODIFY  TOTAL MIP CITATIONS ON RECORD:    1

    CITN    CITATION   TICKET              DATE      COURT YTH    SENT  AGE AT
SEL CNTY      DATE    ISSUED BY  OFN     CONVICTED    APPEARED     CD    CITN
 _   25    06/01/2006  CPOLICE   MIP1    07/06/2006  YC07401       GU1    15
   NOTES:
 _
   NOTES:
 _
   NOTES:

                                                                    PATH: █
```

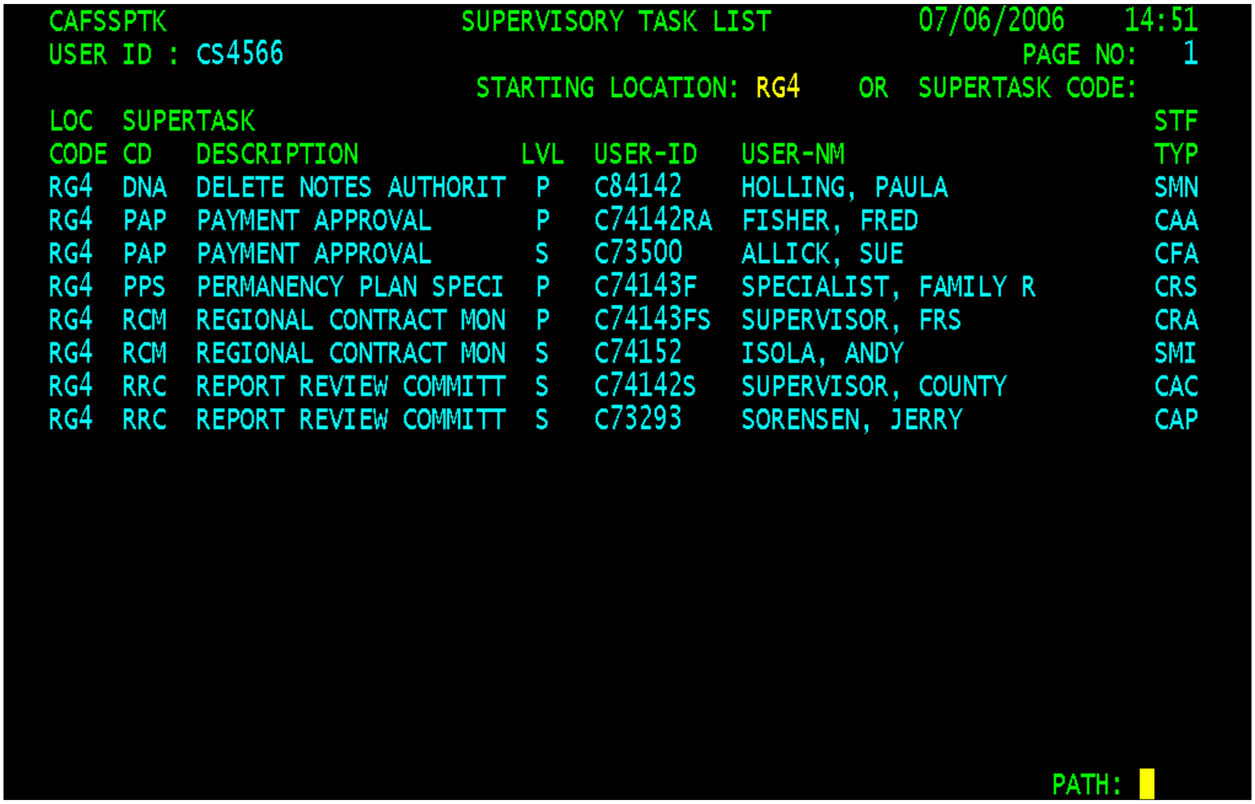
- This screen displays all MIP citations where the youth was convicted.

- If an MIP detail is entered for an individual that is assigned to a worker as a client or as an open juvenile on a probation referral, the worker will receive an alert notifying them of the new information
  - CO2003 = MIP Citation Issued on "DATE" for CAPS ID "ID#"

- Information on this screen is entered by Chemical Dependency/Court Staff workers. The assigned worker will only be able to view the records on the list. No modify of the details will be allowed

- Once an MIP detail is updated on this screen, the system will create a "L" type (law enforcement) address type on the ADDL screen. These address types cannot be modified or deleted

SPTK - Supervisory Task List



```
CAFSSPTK                    SUPERVISORY TASK LIST          07/06/2006    14:51
USER ID : CS4566                                                 PAGE NO:    1
                             STARTING LOCATION: RG4    OR   SUPERTASK CODE:
LOC  SUPERTASK                                                             STF
CODE CD   DESCRIPTION            LVL  USER-ID   USER-NM                    TYP
RG4  DNA  DELETE NOTES AUTHORIT  P    C84142    HOLLING, PAULA             SMN
RG4  PAP  PAYMENT APPROVAL       P    C74142RA  FISHER, FRED               CAA
RG4  PAP  PAYMENT APPROVAL       S    C73500    ALLICK, SUE                CFA
RG4  PPS  PERMANENCY PLAN SPECI  P    C74143F   SPECIALIST, FAMILY R       CRS
RG4  RCM  REGIONAL CONTRACT MON  P    C74143FS  SUPERVISOR, FRS            CRA
RG4  RCM  REGIONAL CONTRACT MON  S    C74152    ISOLA, ANDY                SMI
RG4  RRC  REPORT REVIEW COMMITT  S    C74142S   SUPERVISOR, COUNTY         CAC
RG4  RRC  REPORT REVIEW COMMITT  S    C73293    SORENSEN, JERRY            CAP










                                                                     PATH:
```

- This screen displays all of the workers that have a particular "supertask" assigned to them
  - A supertask is a certain function in CAPS, and only those workers that hold that designated supertask have the ability to perform that task. For example, "payment release" or "report review committee"

- Workers can search for supertasks by entering a STARTING LOCATION
  - For example, if a worker wanted to identify the supertask workers in county 25, they can enter 025 in the location field and the system would list all of the supertask workers for county 25

- Workers can search for supertasks by entering a SUPERTASK CODE
  - For example, if a worker wanted to identify the primary AKA supertask for their region, they can enter 'AKA' in the code field and the system would list all of the AKA supertask workers

- The screen will list the location, supertask code and description, the level of approval (P=primary, S=secondary), the USER ID and NAME of the supertask worker, and the supertask worker's staff type

CAPS Notes and DocGen System

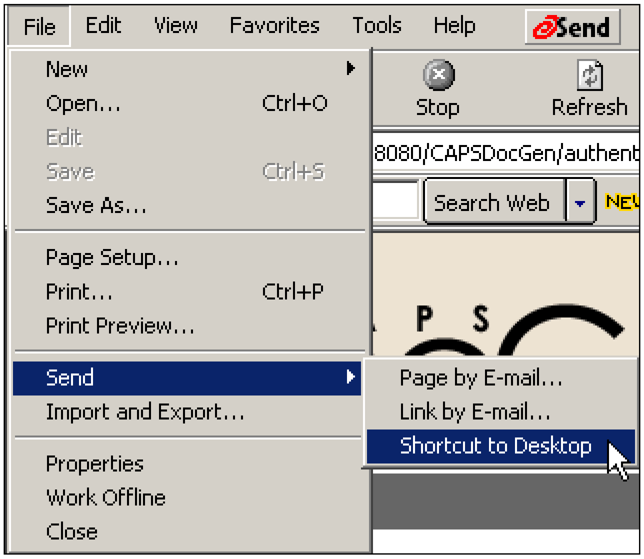
There are a couple of important items to note:

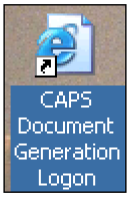
- **The URL for CAPS DocGen is https://js.hhs.mt.gov:8445/CAPSDocGen/ This URL is case-sensitive, so you must enter it EXACTLY as shown.**
- In order to use CAPS DocGen, you must have Adobe Reader loaded on your machine. If you do not already have Adobe Reader, this download is free and can be accessed through the Adobe website (www.adobe.com). If you have questions or concerns about downloading this software, contact your supervisor or network staff person.
- You DO NOT have to currently be in the CAPS system in order to run documents or to save or retrieve notes. Documents and notes are no longer "screen" specific.
- PLEASE log out following the logout procedures provided in this document.
- Use the menu options on the left of the screen or the link options on the bottom of the screen. **Do not use the BACK or FORWARD buttons to navigate in CAPS DocGen**.
- Should you receive any errors while attempting to process a document, store or retrieve notes, please contact the CAPS Help Desk as soon as possible.

Creating a Desktop Shortcut

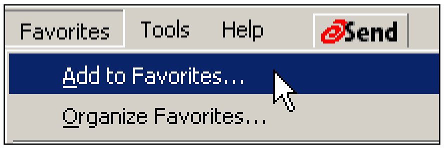
The easiest way to access the CAPS DocGen system is to select the icon that will display directly on your desktop. This way, when you select that icon, the CAPS DocGen Logon page will open and you don't have to keep trying to remember the URL! If you do not already have a CAPS DocGen icon, you can create one following these steps:

- Access the CAPS DocGen Logon page, click on FILE, select SEND, and select SHORTCUT TO DESKTOP.


File
Edit
View
Favorites
Tools
Help
Send
New
Open... Ctrl+O
Edit
Save Ctrl+S
Save As...
Page Setup...
Print... Ctrl+P
Print Preview...
Send
Import and Export...
Properties
Work Offline
Close
Stop
Refresh
8080/CAPSDocGen/authent
Search Web
Page by E-mail...
Link by E-mail...
Shortcut to Desktop

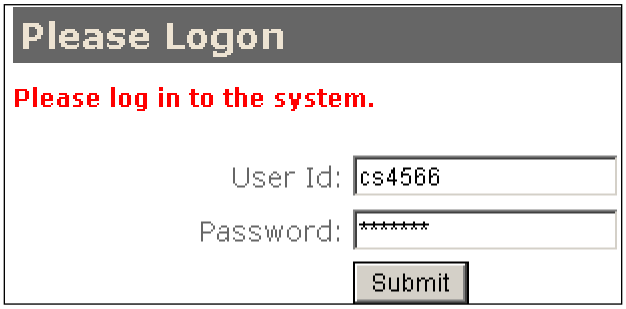
- That's all there is to it! The icon may look something like this . From now on, you can access the CAPS DocGen Logon screen by double-clicking this icon.

- If you are unable to create a shortcut following this format, or this option isn't available to you, please contact the DPHHS Help Desk at 444-9500. They will be able to help you create this shortcut.
- If you prefer, you may also add the CAPS DocGen Logon screen to your list of favorites by clicking FAVORITES, then selecting ADD TO FAVORITES.



Logging On

Before you can access the system, you must logon first. To logon, enter your mainframe USER ID and PASSWORD (this is the same ID and password you use to log onto the CAPS system. Once you have entered your ID and password, click on the Submit button or simply press your Enter key.



Please Logon

Please log in to the system.

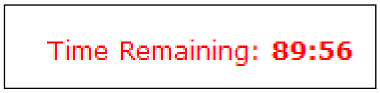
User Id: cs4566

Password: ********

If you experience any problems logging in to the system, there is a "contact the CAPS Help Desk" link to the right of the logon fields. When you click this link, Outlook will automatically open an e-mail message to the CAPS Help Desk. Be sure to enter what the problem is and/or any error messages you are receiving before you send your message so the problem can be researched more effectively.

Once you log on, the system will display the WELCOME page. From there, you can select any of the options available in the CAPS DocGen system.

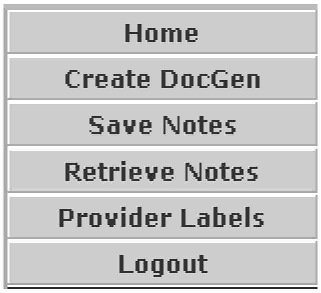
Once you log on, the system will display a time clock, letting you know how much longer you have before the system will time out.



Time Remaining: 89:56

General Screen Information

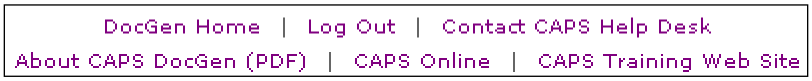
On the left hand side of each screen you should see a menu that looks like this:



Each option will be described in more detail in separate sections, but here is a brief summary:

- HOME – selecting this button will return you back to the CAPS DocGen Home/Welcome page.
- CREATE DOCGEN – selecting this button will take you to the Document Generation page where you will select the document you wish to generate.
- SAVE NOTES – selecting this button will take you to the Save Notes page where you will identify the notes association and file location of the notes document you saved previously.
- RETRIEVE NOTES – selecting this button will take you to the Retrieve Notes page where you will identify the notes association and appropriate ID number.
- PROVIDER LABELS – selecting this button will take you to the Provider Labels Request page where you can generate mailing labels for licensed facilities (this function will primarily be used by provider licensing staff.)
- LOGOUT – selecting this button will initiate your logoff from the CAPS DocGen system. **NOTE: it is important that you click the logout button when you are ready to leave this system. DO NOT simply click the "X" or select FILE, CLOSE.**

On the bottom of each screen, you should see options that look like this:


DocGen Home | Log Out | Contact CAPS Help Desk
About CAPS DocGen (PDF) | CAPS Online | CAPS Training Web Site

Some of these options perform the same function as the buttons on the left side of the screen. Others provide you with quick access to other websites. Here is a brief summary:

- DocGen Home – selecting this option will return you back to the CAPS DocGen Home/Welcome page.
- Log Out – selecting this option will initiate your logoff from the CAPS DocGen system. **Again, it is important to select either the logout button on the menu, or the logout link on the bottom of the screen when you are ready to leave this system.**
- Contact CAPS Help Desk – selecting this option will cause Outlook to automatically open an e-mail message to the CAPS Help Desk.
- About CAPS DocGen (PDF) – selecting this option will open a document that contains the information you are reading right now!

- CAPS Online – selecting this option will open a separate browser window where you can log into CAPS using online Attachmate. For further information on how to access CAPS online, contact the ITSD Help Desk at 444-2000 or isdcustsup@state.mt.us.
- CAPS Training Web Site – selecting this option will open a separate browser window where you can access information like the CAPS training schedule, CAPS training manuals, and the CFSD policy manual.

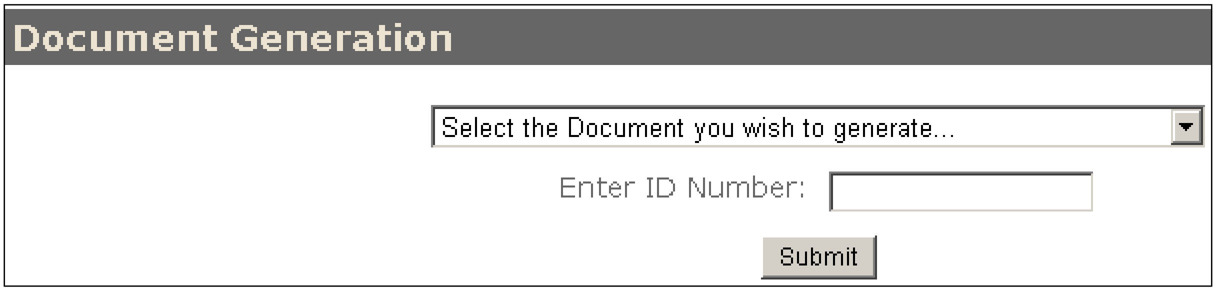
Home Button

Selecting the Home Button from the menu (or the DocGen Home link at the bottom of the screen) will return you back to the CAPS DocGen Home/Welcome page. **Do not use the BACK button**.

If you see Welcome Mary Reynolds (except with your name), you know you are on the Home/Welcome page.

Create DocGen Button

This is the button you will select when you want to create documents (for example, the Letter to the Perpetrator, Provider License, Foster Care Review or Juvenile Offense Record.) When you select the Create DocGen button, you will be taken to a screen where you should see the following:



Document Generation

You will no longer have access to every document available through this process. Document access is now associated to your staff type. What that means to you is, when you click the "Select the Document you wish to generate…" drop down list, you will only see those documents you have access to. For example, if you are a social worker, you will not see any of the juvenile probation documents on your list, and if you are a probation officer, you will not see any of the provider licensing documents on your list.

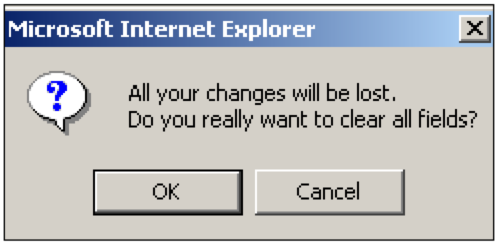
- If you believe you should have access to a specific document, and it is not on your list of available documents, please contact the CAPS Help Desk. Identify why you need access to this document and request that the document be added to your staff type.

Based on the document that you select, the text associated to the ID Number field will change. Person, Client or Juvenile related documents will require a CAPS ID, Report related documents will require a R/R number, and Provider related documents will require a Provider number. Once you select the document you wish to generate, the system will begin the process. One of the following will happen depending on the document you selected:

- Adobe will create the document for display in a separate browser window (depending on the version of Adobe Reader you have, you may be asked if you would like to “Open” or “Save” the document. Select “Open”.)
- The system will display a page of questions that must be answered before the document can be created.

If the system displays a page of questions, there will be three options available at the bottom of the page.

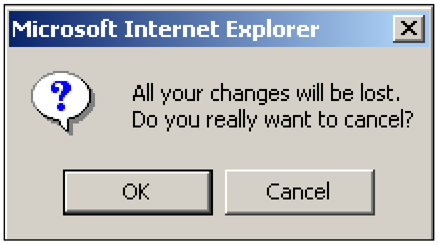
- Click OK when you are finished answering the questions and you wish to proceed with generating the document.
- Click Clear All if you would like to clear all of your answers and start again. You will receive the following message:



All your changes will be lost.
Do you really want to clear all fields?

If you click OK, the question page will be refreshed and you can begin answering the questions again.

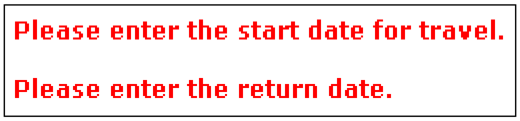
- Click Cancel if you would like to quit processing this document. You will receive the following message:



All your changes will be lost.
Do you really want to cancel?

If you click OK, you will be returned to the Document Generation page.

The document will not continue processing until you have answered all of the required questions. If you missed any required questions/answers, you will be taken back to the top of the question page, and what is required will be listed in red like this:



Please enter the start date for travel.

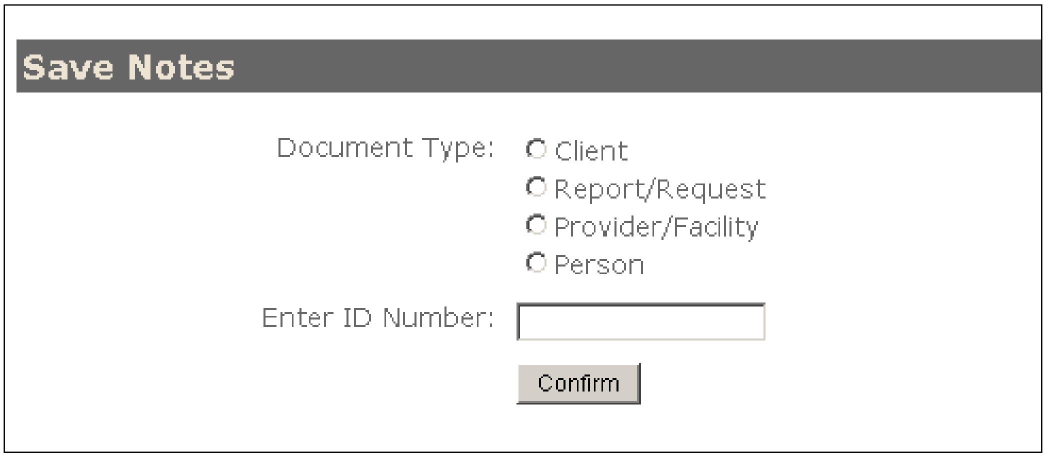
Please enter the return date.

It is **important** that any information that you want the document to pull from the CAPS system be entered **in the CAPS system**. Because the finished document will be displayed in PDF format, you will not have ability to modify the document before printing.

If you select a document that calls for notes to be retrieved, the system will display the list of all associated notes. You must open and print each note file separately in addition to the document you are processing.

Save Notes Button

This is the button you will select when you want to associate notes to a person, client, report/request, provider/facility or juvenile probation referral. When you select the Save Notes button, you will be taken to a screen where you should see the following:



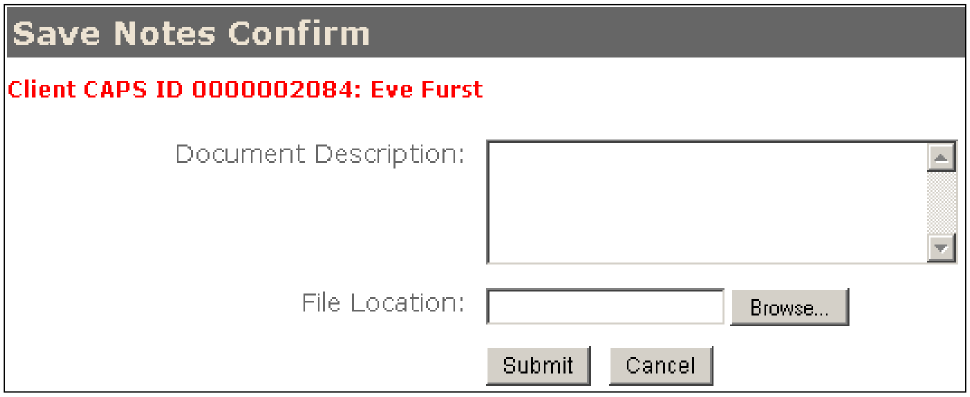
There are a couple of important things to remember regarding the Notes feature:

- Notes are no longer associated to a specific screen in the CAPS system.
- Notes no longer require the use of WordPerfect word processing software.
- You can save your notes initially wherever you would like (for example, on disk, in a shared directory or in your C: directory.)

You can type your notes using any word processing software. As a matter of fact, you don't have to use any word processing software at all. For example, if you have a spreadsheet in Excel, or a downloaded picture that you would like to attach as notes, you can!

- **IMPORTANT NOTE**: Regardless of the program that you use to save your notes, be sure to use the standard extensions that are assigned to these documents (for example, Word uses .doc, WordPerfect uses .wpd, Excel uses .xls). If you create "special" extensions (for example, .123 or .bob) the system does not know what program was used to create the document and will be unable to open it when it is selected for retrieval.

When you are ready to save your notes to CAPS, select the appropriate Document Type, enter the appropriate ID number, and then click Confirm. You should then be taken to a screen where you should see the following:



Save Notes Confirm

Client CAPS ID 0000002084: Eve Furst

Document Description:
File Location:
Browse...
Submit
Cancel

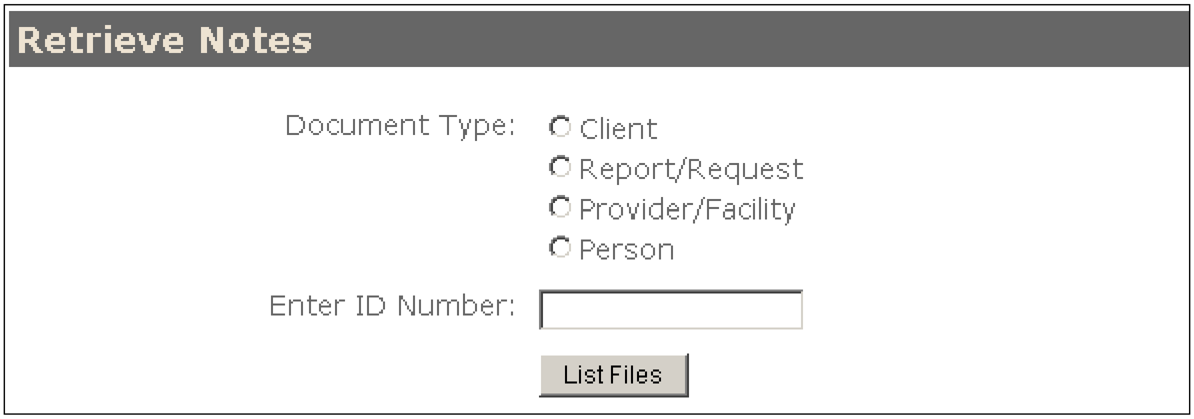
This is the Save Notes Confirm box. You will be able to view exactly who or what the notes will be associated with before you attach them. Make sure you are associating the notes to the correct person, client, provider, report or juvenile referral before submitting your file!

Enter a Document Description (you have space to enter up to 200 characters – this is to be considered a “title” for your notes), and then enter the File Location for your document (you can click on the Browse... button to search for your document if you are unsure of the location.)

Click Submit. If the notes were stored, you should see message “File successfully uploaded” displayed in red at the top of the screen.

Retrieve Notes Button

This is the button you will select when you want to retrieve notes associated to a person, client, report/request, provider/facility or juvenile probation referral. When you select the Retrieve Notes button, you will be taken to a screen where you should see the following:

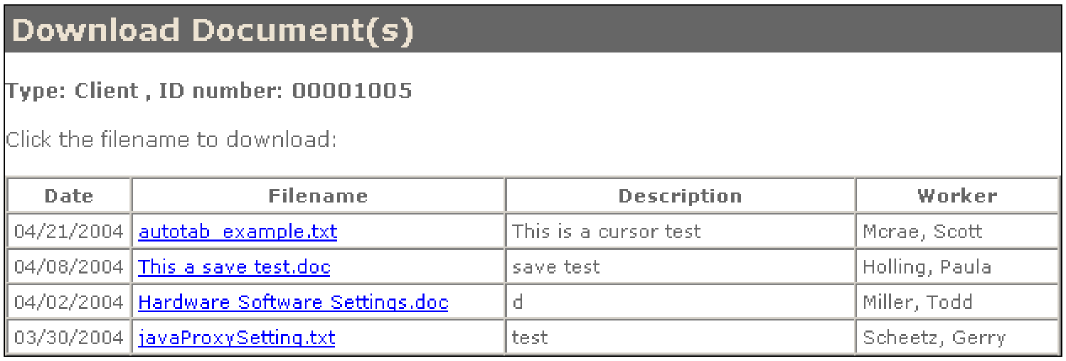


Retrieve Notes

Document Type:
○ Client
○ Report/Request
○ Provider/Facility
○ Person
Enter ID Number:
List Files

To retrieve the notes associated with a person, client, report/request, provider/facility or juvenile probation referral, select the appropriate document type and then the appropriate ID number.

Click List Files. The system will search for any notes associated to the document type and ID number that you have entered. If there are no notes, you will receive the following message: "there are no notes stored for the requested ID." If there are notes, the system will display a list that will look similar to this:



Download Document(s)

Type: Client , ID number: 00001005

Click the filename to download:

Date	Filename	Description	Worker
04/21/2004	autotab_example.txt	This is a cursor test	Mcrae, Scott
04/08/2004	This a save test.doc	save test	Holling, Paula
04/02/2004	Hardware Software Settings.doc	d	Miller, Todd
03/30/2004	javaProxySetting.txt	test	Scheetz, Gerry

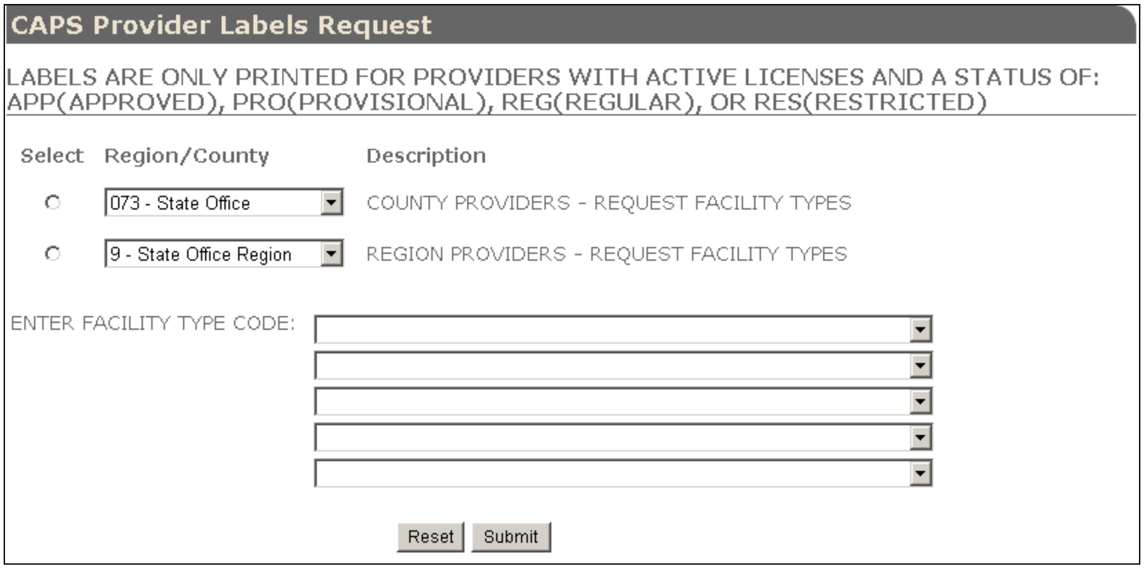
This list will display the date the notes were saved, the filename, a description of the notes, and the name of the worker that saved the notes.

To open a document, simply click on the Filename and the document will open in the program that it was saved in. (The exception to this is documents saved in WordPerfect (.wpd extension) will be opened in Word.)

Provider Labels Button

This is the button you will select when you want to create mailing labels for selected facility types. When the Provider Labels option is selected, the CAPS Provider Labels Request page will display.

The CAPS Provider Labels Request page looks like this:



CAPS Provider Labels Request

LABELS ARE ONLY PRINTED FOR PROVIDERS WITH ACTIVE LICENSES AND A STATUS OF: APP(APPROVED), PRO(PROVISIONAL), REG(REGULAR), OR RES(RESTRICTED)

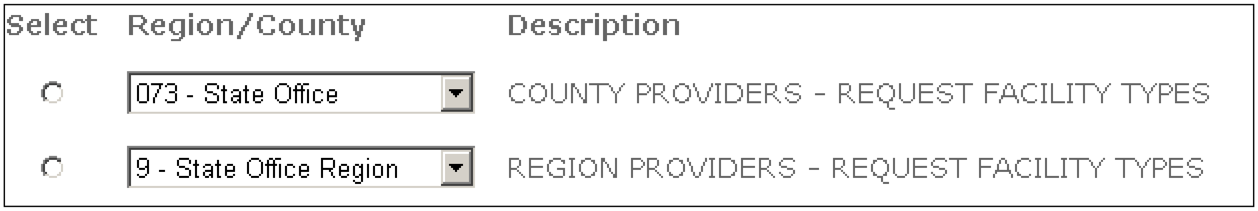
Select	Region/County	Description
○	073 - State Office	COUNTY PROVIDERS - REQUEST FACILITY TYPES
○	9 - State Office Region	REGION PROVIDERS - REQUEST FACILITY TYPES

ENTER FACILITY TYPE CODE:

Some important things to note when submitting a labels request:

- Labels will only be created for facilities with ACTIVE licenses. If a license is expired, terminated or suspended, a label will not be created.
- Labels will only be created for facilities with a STATUS of Approved (APP), Provisional (PRO), Regular (REG) and Restricted (RES). If a license has a status other than the four listed, a label will not be created (for example - “intending to be licensed” kinship licenses will not get a label.)
- The facility address used for the label will follow a hierarchy (if the facility has multiple address types listed on PADL.) This hierarchy is Mailing, Residential and Warrant. If a facility has no address on PADL, a label will be created that contains NO ADDRESS for the facility name and facility number.
- Labels for **adoption** facilities (ADP or CAA facility types) can only be requested by workers with a SPG (Program Bureau: Foster Care Specialist), SPE (Program Bureau: Adoption Specialist) or CRA (Regional FRS Supervisor) staff type.
- Labels for **tribal** facilities (TFA, TFF, TFN, TGK, TGN, TKI and TRA facility types) can only be requested by workers with a SPG (Program Bureau: Foster Care Specialist), SPE (Program Bureau: Adoption Specialist) or Tribal staff type.

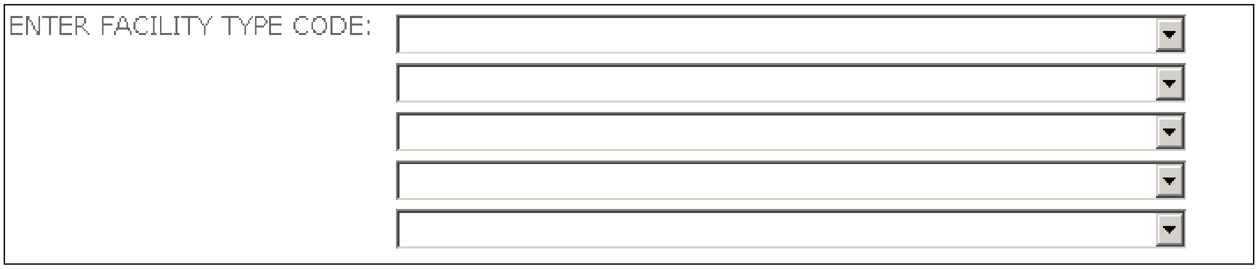
Select Options



Select	Region/County	Description
○	073 - State Office	COUNTY PROVIDERS - REQUEST FACILITY TYPES
○	9 - State Office Region	REGION PROVIDERS - REQUEST FACILITY TYPES

Your contact REGION and COUNTY will automatically be defaulted.

- Either the County or Region radio button must be selected in order to generate a labels request.
- County and Region are both drop-down lists and the county/region can be changed as necessary based on the labels needed (following security edits as identified above.)
- If a County or Region is not selected, you will receive an error message when you attempt to submit your request that a County or Region is required.



ENTER FACILITY TYPE CODE:

No facility types will automatically be defaulted.

- Facility Type Code is a drop-down list and at least one facility type must be selected in order to generate a labels request.

- Up to a maximum of five facility types can be selected.
- If at least one Facility Type Code is not selected, you will receive an error message when you attempt to submit your request that a Facility Type Code is required.

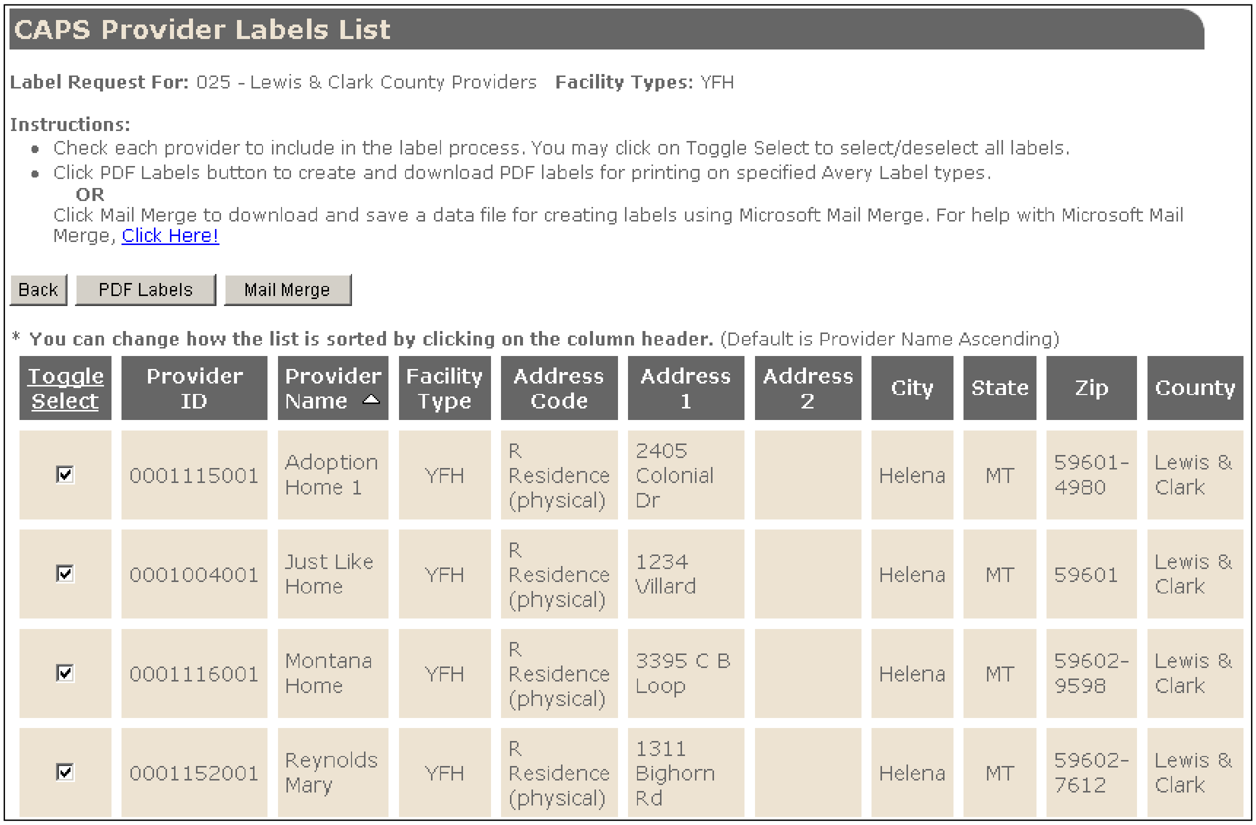
Reset
Submit

If you wish to clear all entries made on the labels request page before submitting, you can click the RESET button.
When you are ready to submit your request, you can click the SUBMIT button. When the submit button is selected, the CAPS Provider Label List will display.

- If there are no facilities matching the request, you will receive an error message when you attempt to submit your request that no providers were found matching the selected criteria.

CAPS Provider Labels List

The CAPS Provider Labels List page looks like this:



CAPS Provider Labels List

Label Request For: 025 - Lewis & Clark County Providers **Facility Types:** YFH

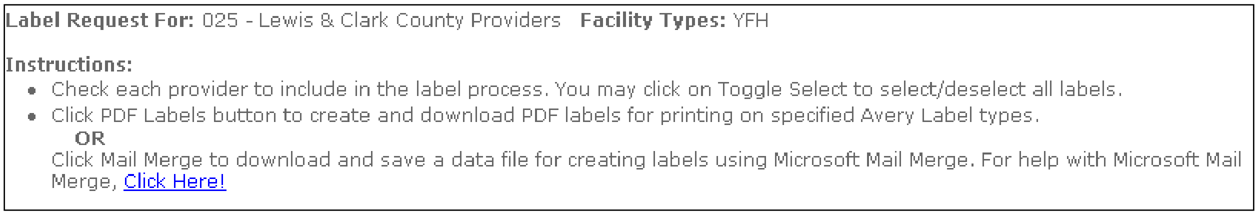
Instructions:

- Check each provider to include in the label process. You may click on Toggle Select to select/deselect all labels.
- Click PDF Labels button to create and download PDF labels for printing on specified Avery Label types.
  OR
  Click Mail Merge to download and save a data file for creating labels using Microsoft Mail Merge. For help with Microsoft Mail Merge, Click Here!

* **You can change how the list is sorted by clicking on the column header.** (Default is Provider Name Ascending)

Toggle Select	Provider ID	Provider Name ▲	Facility Type	Address Code	Address 1	Address 2	City	State	Zip	County
☑	0001115001	Adoption Home 1	YFH	R Residence (physical)	2405 Colonial Dr		Helena	MT	59601-4980	Lewis & Clark
☑	0001004001	Just Like Home	YFH	R Residence (physical)	1234 Villard		Helena	MT	59601	Lewis & Clark
☑	0001116001	Montana Home	YFH	R Residence (physical)	3395 C B Loop		Helena	MT	59602-9598	Lewis & Clark
☑	0001152001	Reynolds Mary	YFH	R Residence (physical)	1311 Bighorn Rd		Helena	MT	59602-7612	Lewis & Clark

This page will display the list of providers who match the criteria entered on the CAPS Provider Labels Request page.



Label Request For: 025 - Lewis & Clark County Providers **Facility Types:** YFH

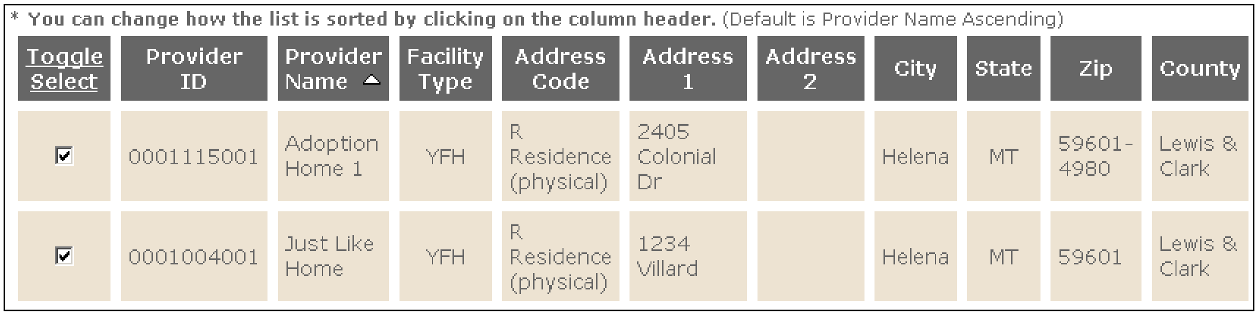
Instructions:

- Check each provider to include in the label process. You may click on Toggle Select to select/deselect all labels.
- Click PDF Labels button to create and download PDF labels for printing on specified Avery Label types.
  OR
  Click Mail Merge to download and save a data file for creating labels using Microsoft Mail Merge. For help with Microsoft Mail Merge, Click Here!

The top part of the page will display the criteria used to generate the list (in this case, I submitted a request for all active YFH (Youth Foster Home) facilities in County 25 (Lewis & Clark).

Instructions for selecting providers and how to use the PDF labels and Mail Merge features are also listed for you.

- NOTE: Creating labels using the PDF Labels option or the Mail Merge option are heavily dependent on additional settings on your personal computer. If there are problems printing the labels created using CAPS DocGen, it may have to do with those settings in Adobe (PDF) or Word (Mail Merge). Please keep that in mind when creating labels!

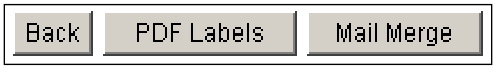


*** You can change how the list is sorted by clicking on the column header.** (Default is Provider Name Ascending)

Toggle Select	Provider ID	Provider Name ▲	Facility Type	Address Code	Address 1	Address 2	City	State	Zip	County
☑	0001115001	Adoption Home 1	YFH	R Residence (physical)	2405 Colonial Dr		Helena	MT	59601-4980	Lewis & Clark
☑	0001004001	Just Like Home	YFH	R Residence (physical)	1234 Villard		Helena	MT	59601	Lewis & Clark

The list will display all providers who match the criteria entered on the CAPS Provider Labels Request page. Information displayed includes, Select Option, Provider ID, Provider Name, Facility Type, Address Code, Address 1, Address 2, City, State, Zip and County.

- All facilities will default as selected for a label. You can click TOGGLE SELECT to UNSELECT all facilities. You can also select/unselect individual facilities by clicking the check box next to each facility.
- The list will automatically be sorted in ascending order by PROVIDER NAME. You can change the sort order of the list by clicking on any column header.



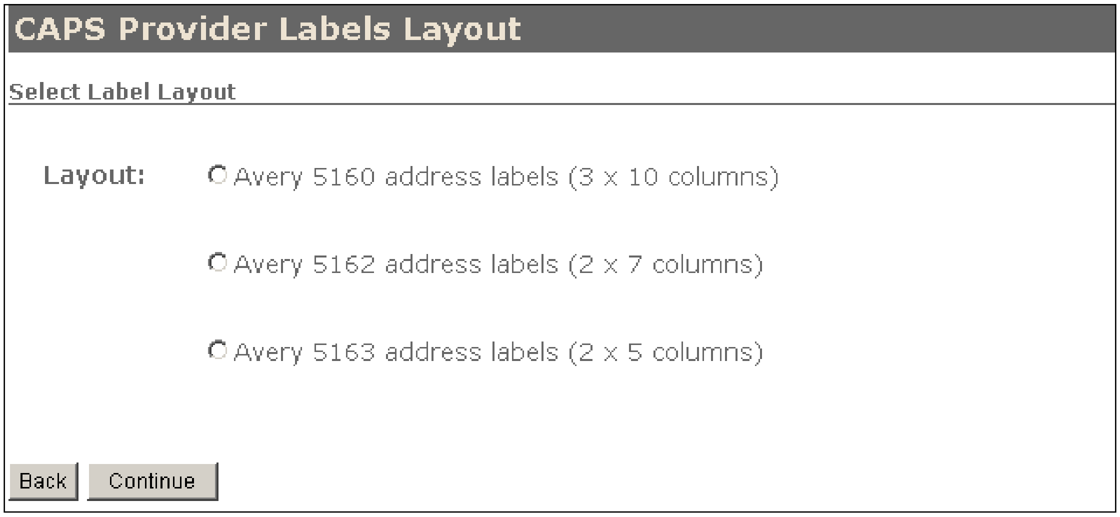
Clicking the BACK button will return you to the CAPS Provider Labels Request page.

Clicking the PDF Labels button will take you to the CAPS Provider Labels Layout page.

Clicking the MAIL MERGE button will create a merge file arranged in table format. This file will contain the address information for the providers checked on the list.

PDF Labels

The CAPS Provider Labels Layout page looks like this:



CAPS Provider Labels Layout

Select Label Layout

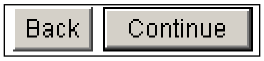
Layout: ○ Avery 5160 address labels (3 x 10 columns)

○ Avery 5162 address labels (2 x 7 columns)

○ Avery 5163 address labels (2 x 5 columns)

You will have the option of selecting one of three different label sizes. You must select one of the layouts in order to continue processing your labels request. If a Layout is not selected, you will receive an error message when you attempt to submit your request that a Label Layout is required.

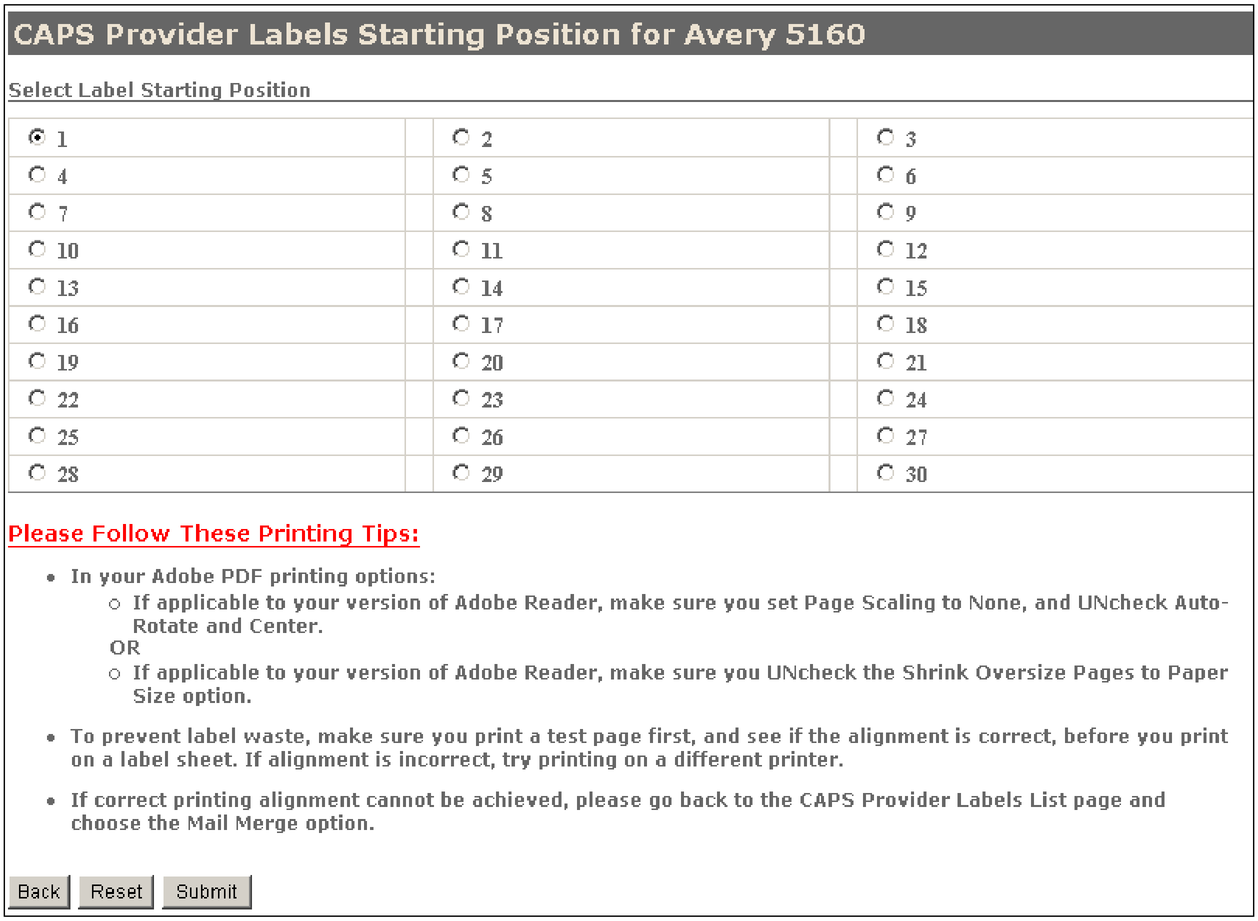
- Avery 5160 address labels. These labels contain sheets of 30 labels (3 across and 10 down.) These labels would be appropriate for regular letter sized envelopes.
- Avery 5162 address labels. These labels contain sheets of 14 labels (2 across and 7 down.) These labels would be appropriate for larger envelopes.
- Avery 5163 address labels. These labels contain sheets of 10 labels (2 across and 5 down.) These labels would be appropriate for larger envelopes or packages.



Clicking the BACK button will return you to the CAPS Provider Labels List page.

Clicking the CONTINUE button will take you to the CAPS Provider Labels Starting Position page.

The CAPS Provider Labels Starting Position page looks like this:



CAPS Provider Labels Starting Position for Avery 5160

Select Label Starting Position

● 1	○ 2	○ 3
○ 4	○ 5	○ 6
○ 7	○ 8	○ 9
○ 10	○ 11	○ 12
○ 13	○ 14	○ 15
○ 16	○ 17	○ 18
○ 19	○ 20	○ 21
○ 22	○ 23	○ 24
○ 25	○ 26	○ 27
○ 28	○ 29	○ 30

Please Follow These Printing Tips:

- In your Adobe PDF printing options:
  - If applicable to your version of Adobe Reader, make sure you set Page Scaling to None, and UNcheck Auto-Rotate and Center.

  OR
  - If applicable to your version of Adobe Reader, make sure you UNcheck the Shrink Oversize Pages to Paper Size option.
- To prevent label waste, make sure you print a test page first, and see if the alignment is correct, before you print on a label sheet. If alignment is incorrect, try printing on a different printer.
- If correct printing alignment cannot be achieved, please go back to the CAPS Provider Labels List page and choose the Mail Merge option.

This page will allow you to select the starting position for your labels, based on the type of label you selected (5160, 5162 or 5163.) This is so you can utilize partially used sheets of labels and not have any label waste! Select the radio button in front of the desired starting position and that is where the first label will print.

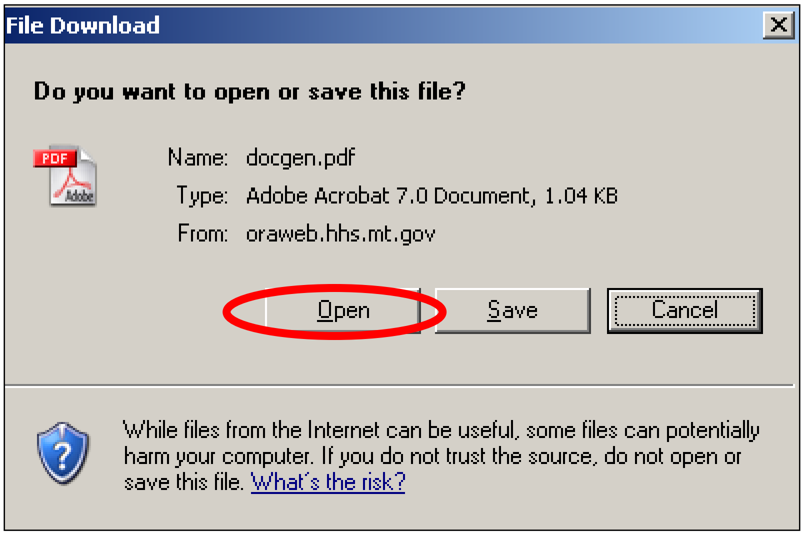
This page also contains some PRINTING TIPS for PDF labels. **Please pay close attention to these tips as they may affect the result of your printed labels**.

- Setting your page scaling to none and unchecking auto-rotate and center is something you will need to verify each time you print labels in the PDF format.
- Where these settings are located are dependent on the version of Adobe Reader you have on your machine.
- It is always recommended that you print a "test page" (print your PDF document on regular paper) before you attempt to print on an actual sheet of labels. This will allow you to verify alignment.

Back
Reset
Submit

Clicking the BACK button will return you to the CAPS Provider Labels Layout page.
Clicking the RESET button will set the label starting position back to "1".
Clicking the SUBMIT button will create the PDF document for your labels. When you click the

SUBMIT button you will receive a File Download box that looks like this:

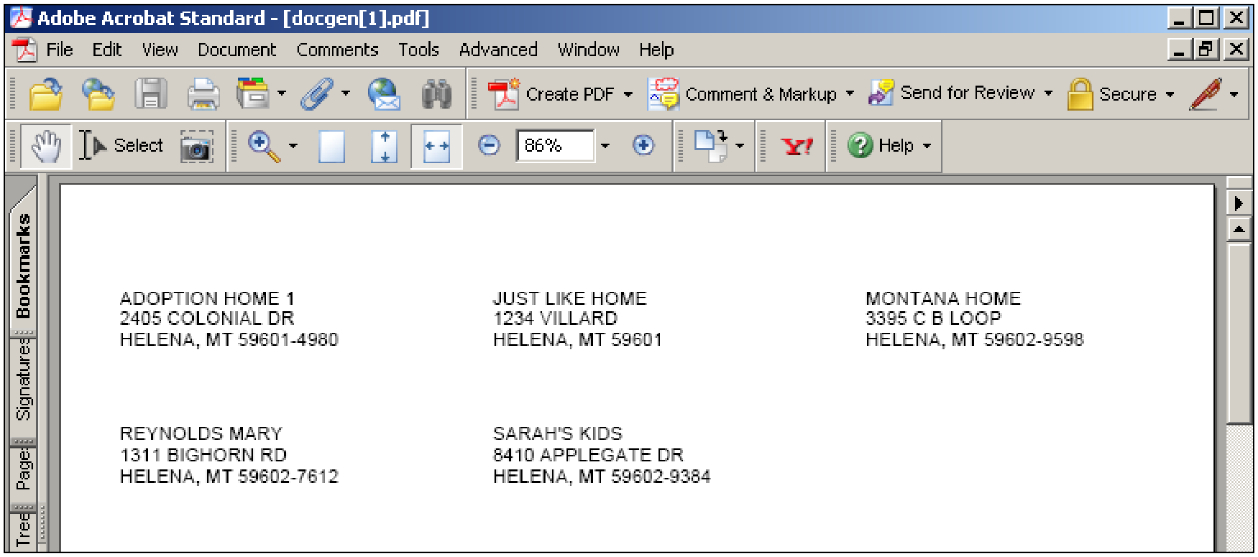

File Download
Open
Save
Cancel
What's the risk?

Do you want to open or save this file?

Name: docgen.pdf
Type: Adobe Acrobat 7.0 Document, 1.04 KB
From: oraweb.hhs.mt.gov

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Click OPEN to generate the PDF document. You should then receive a document that looks similar to this (again, based on the label type you selected):


Adobe Acrobat Standard - [docgen[1].pdf]
File
Edit
View
Document
Comments
Tools
Advanced
Window
Help
Create PDF
Comment & Markup
Send for Review
Secure
Select
86%
Help
Bookmarks
Signatures
Pages
Tree

ADOPTION HOME 1
2405 COLONIAL DR
HELENA, MT 59601-4980

JUST LIKE HOME
1234 VILLARD
HELENA, MT 59601

MONTANA HOME
3395 C B LOOP
HELENA, MT 59602-9598

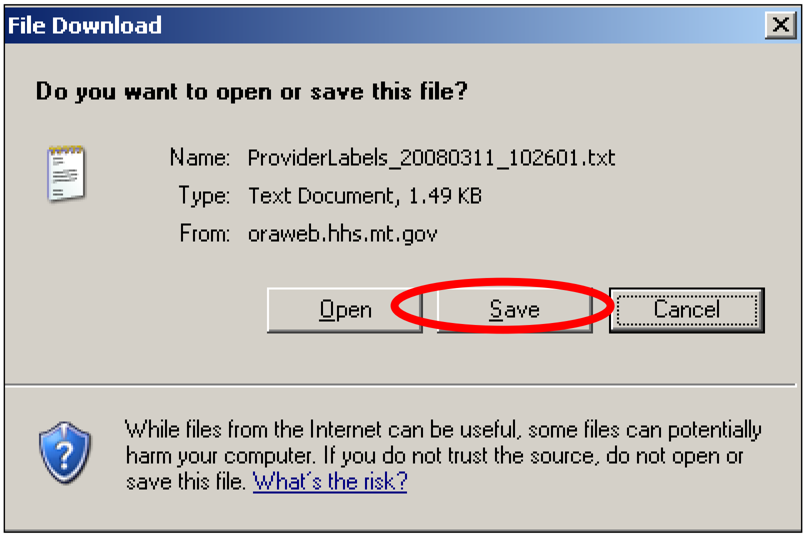
REYNOLDS MARY
1311 BIGHORN RD
HELENA, MT 59602-7612

SARAH'S KIDS
8410 APPLEGATE DR
HELENA, MT 59602-9384

Once the PDF document has been created, you can print your labels just like you print any other document.

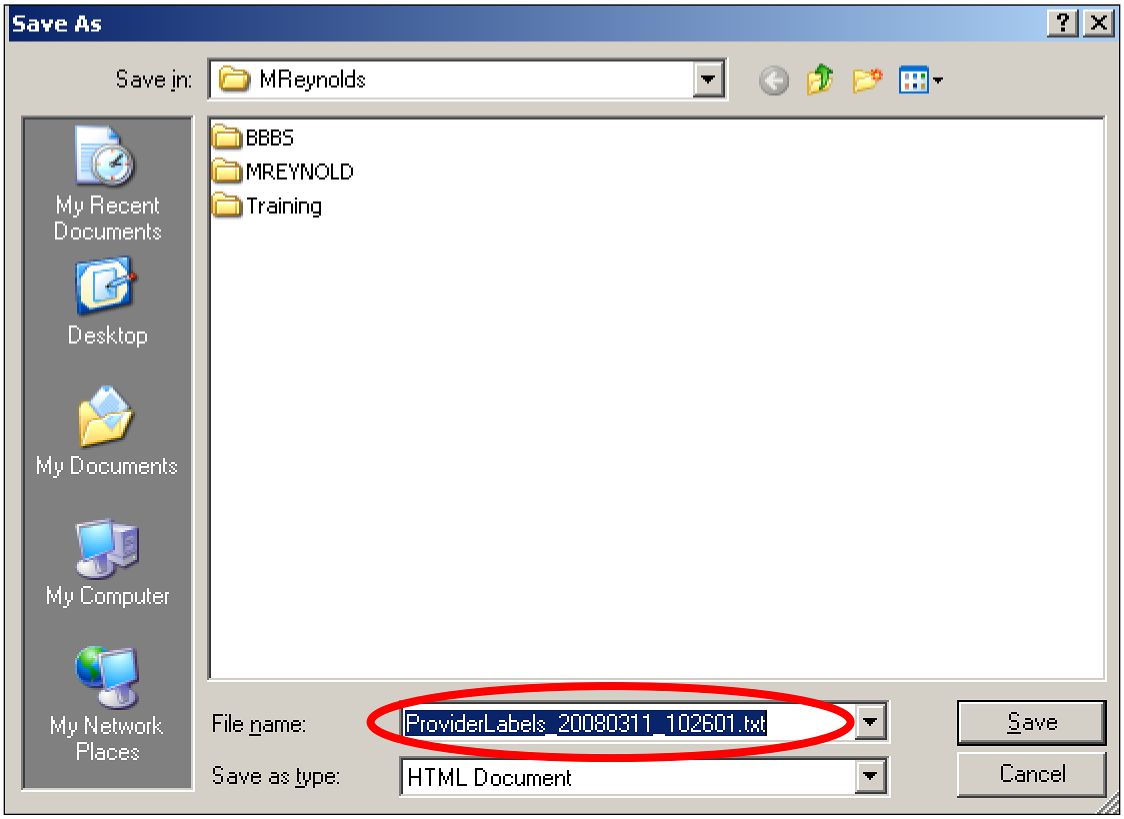
Mail Merge

When you click the MAIL MERGE button on the CAPS Provider Labels List page, you will receive a File Download box that looks like this:


File Download
Do you want to open or save this file?
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Name: ProviderLabels_20080311_102601.txt
Type: Text Document, 1.49 KB
From: oraweb.hhs.mt.gov

Click SAVE to save the file to your computer. You should receive a Save As box that looks similar to this:


Save As
Save in:
MReynolds
BBBS
MREYNOLD
Training
My Recent Documents
Desktop
My Documents
My Computer
My Network Places
Save
Cancel

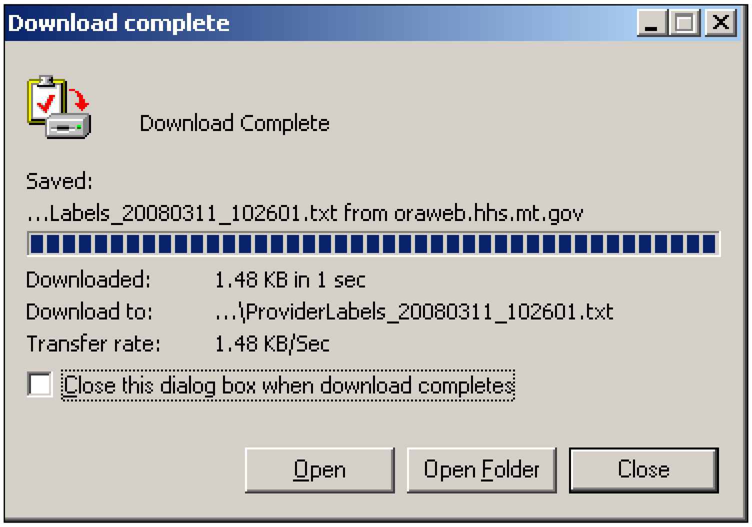
File name: ProviderLabels_20080311_102601.txt
Save as type: HTML Document

When the Save As box appears, click SAVE. You can store the document wherever you typically save files on your computer. This may be different for each worker.

- The file will be saved as a .txt file – do not change the file extension as this can affect the ability to merge the file into your main document later.

- The file name will default to “ProviderLabels_YYYYMMDD_HHMMSS.txt” where YYYYMMDD = current date and HHMMSS = current time.

When you click SAVE, you may receive a Download Complete box that looks like this:



Download Complete

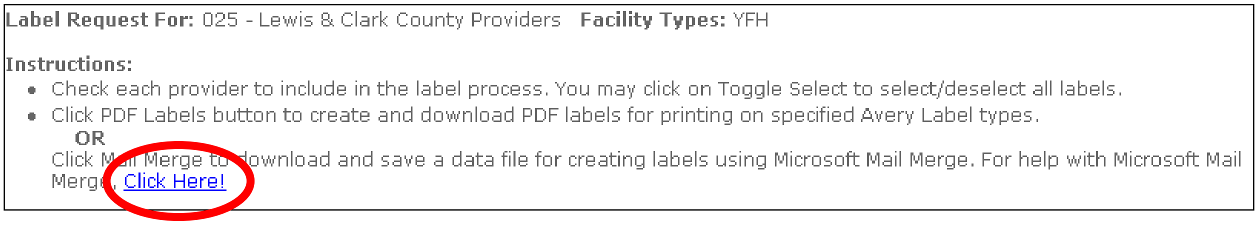
Saved:
...Labels_20080311_102601.txt from oraweb.hhs.mt.gov

Downloaded: 1.48 KB in 1 sec
Download to: ...\ProviderLabels_20080311_102601.txt
Transfer rate: 1.48 KB/Sec

☐ Close this dialog box when download completes

You can click CLOSE at this point. You will use the file later when you perform the Mail Merge in Word.

- For assistance with using the Mail Merge feature in Word, click on the “click here” link located in the instructions area of the CAPS Provider Labels List page



Label Request For: 025 - Lewis & Clark County Providers **Facility Types:** YFH

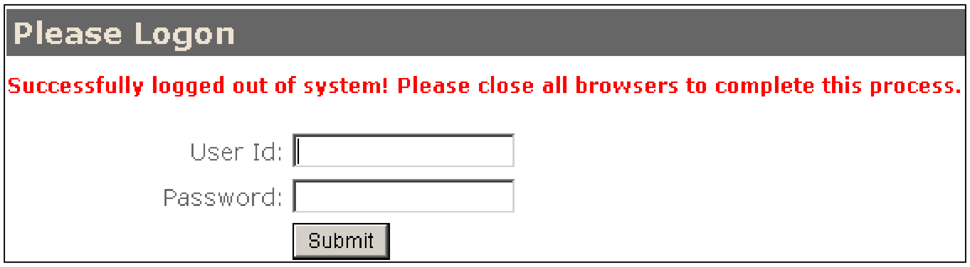
Instructions:

- Check each provider to include in the label process. You may click on Toggle Select to select/deselect all labels.
- Click PDF Labels button to create and download PDF labels for printing on specified Avery Label types.
  OR
  Click Mail Merge to download and save a data file for creating labels using Microsoft Mail Merge. For help with Microsoft Mail Merge, Click Here!

Logout Button

This is the button you will select when you are finished using the CAPS DocGen system. **It is important that you click the logout button when you are ready to leave this system. DO NOT simply click the “X” or select FILE, CLOSE.**

When you select the Logout button, you will be taken back to the Logon screen where you should see the following:


Please Logon

Successfully logged out of system! Please close all browsers to complete this process.

User Id:
Password:
Submit

Once you receive this message, then you can click the "X" or select FILE, CLOSE. This will completely log you out of the CAPS DocGen system.